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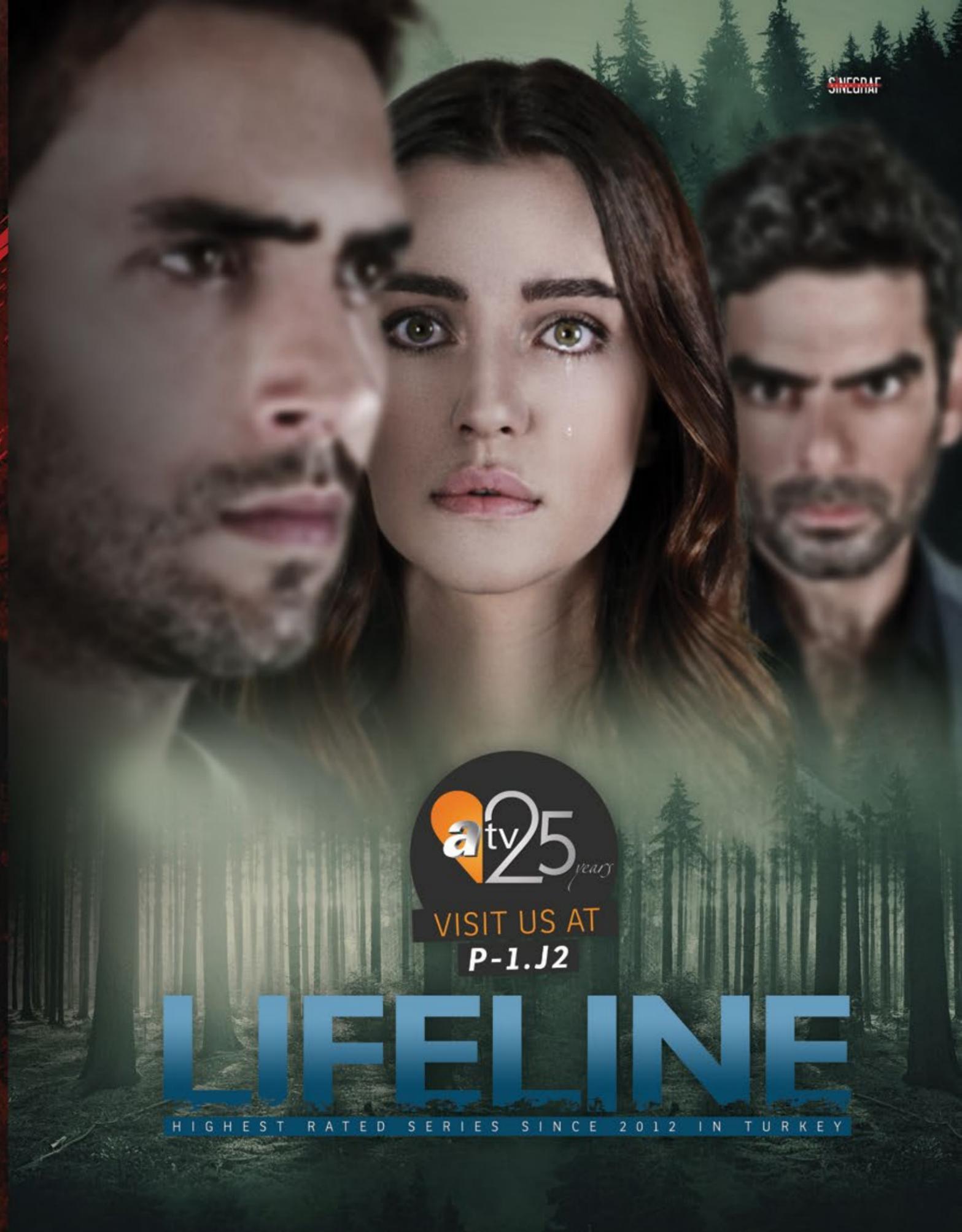


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SINEMA



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LIFELINE

HIGHEST RATED SERIES SINCE 2012 IN TURKEY

MIPTV: what is important

While MIPTV is in a crucial moment because some exhibitors have reinforced their protests against the market, we'd like to stress here the basics: if the goes down, everybody loses, not only Reed Midem. Also the distributors, buyers, producers, services companies... it is important for the content industry to be all together twice per year in one place. The effects would be seen with time, especially for the medium and small companies.

With this, we don't want to vote in favor of the organization, the exhibitor complains have of course very good reasons. We want to stress that the discussion should avoid the question 'MIPTV yes or not?', and to make focus on the actions that can be made to improve the market for everybody.

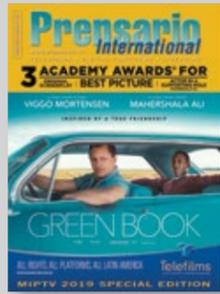
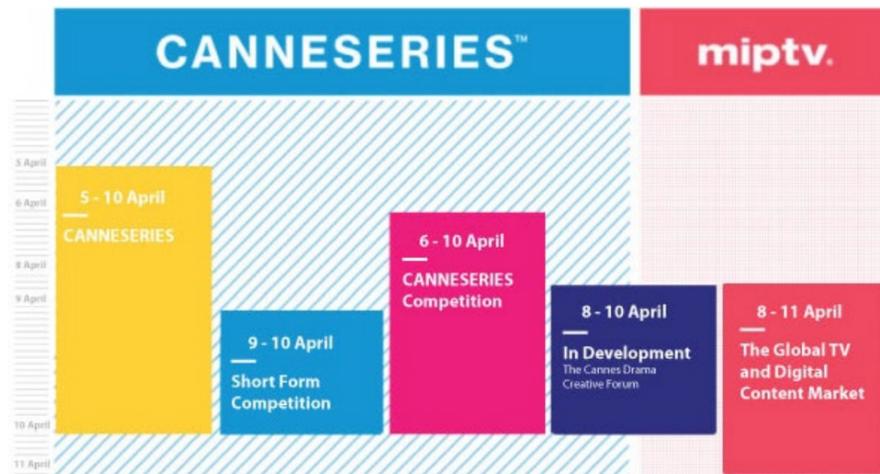
The detractors say that the problem is the basement of the market: France is expensive to come, Cannes is expensive to build a booth, and so on. It is not a question of adding new shows as CannesSeries, or to make more focus on productions. On the other side, Reed

Midem can't change everything for a massive event, but undoubtedly the road to follow is the Mipcancun or MipChina format.

What is this about? To set up a quite close community of buyers and sellers, and to assure meetings between them according to their preferences. This is easier to do in a certain region than above a global basis, but the challenge could generate a very useful event to grow at any continent.

We are in the technology era, with a good variety of software which lets people automate processes and decisions, to include business analytics. Can we imagine new intelligent marketplaces pushing leads and business opportunities? Yes, we can. It is a question of investigating and implementing innovative solutions. And to move MIPTV to other city should be also a possibility.

Glass industry discovered late that their real business was container industry, and they lost everything with plastic newcomers. Come on...



Prensario International

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TF1: 'Our most challenging bets were our greatest successes'

Despite increased competition, TF1 Group's ratings are growing at 32.6% on W<50PDM, the key commercial target for the third consecutive year, demonstrating the relevance of the strategy implemented by Gilles Pélisson, Chairman & CEO, and Ara Aprikian, EVP content.

The leading French TV group has had a great 2018, especially for the *Football World Cup*, which it gathered 19.4 millions viewers (82% market share on the finale), as well as the news offer, with up to 9.7 millions viewers, the French fiction with 8.9 millions, and entertainment with over 10 millions viewers for the charity show *Les Enfoires*. 'This increase is due to our ambitious policy in terms of content, in any genres', underlines Fabrice Bailly, TF1 Group program and acquisitions.

'The other reason has been the performance of our DTT channels TMC, TFX and TF1 Series Films, whose rebranding is paying off. Their editorial complementarity has enabled them to develop their ratings on their respective commercial targets, including younger demos'.

On drama, local series *Infidèle* went to 6.1 millions viewers and US' *SWAT* received 5.9 millions; on entertainment, the re-launch of *Who wants to be a millionaire* with a new host, *PalmaShow* with a new generation of comedians totaled

4.6 millions viewers (36% on W<50PDM); other big releases were major franchises such as French drama *Sam* and *The Voice*, as well as the daily show *Quotidien* on TMC.

Bailly: 'We acquired the format *The Masked Singer* for TF1, and many new shows are expected: *Le Temps est assassin* from Michel Bussi best-seller and *Le Bazar de la charité* a major project which will be our first costume drama, as well new US series like *Manifest*, *New Amsterdam* and the remake of *Magnum*. Several major sporting events like women's FIFA WWC in France, the World Women's Hand Ball Championships, and RWC in the fall. We will also broadcast 4 Grand Prizes'.

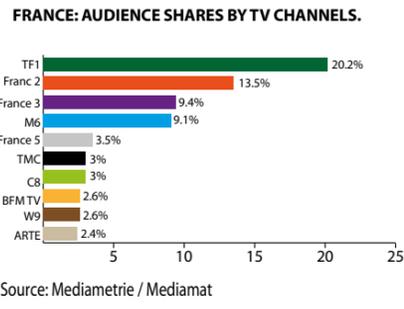
'We put particular emphasis on content produced exclusively for us. We identify a double dynamic in entertainment: the international format market has slowed down a little, allowing us to develop many original, evening or access formats: *Mon plus beau Noël*, *C'est déjà Noël*, *Les plus belles vacances* or *Beauty Match*. Most of them have worked well and are now launched on the international market. There is a new dynamic in international formats, and our ambition is to put ourselves in order of battle to offer viewers the new hits in this field as TF1 has always done', he adds.

Regarding the French industry, Bailly notes: 'Our sector is evolving faster than ever and the French market is no exception: technological changes and changes in lifestyles have led to an individualization of content consumption; the rise of new players is changing the competitive landscape'.

'The international influence of French content has never been so strong: 2018 is a record year for the export of French programs, especially on animation, a genre in which France has built a worldwide reputation.

Documentaries and dramas represent an increasingly part of French programs exported, too. This evolution reflects the very strong creative dynamic that drives the entire French audiovisual sector, which has now emancipated itself from its old complexes in relation to US productions'.

Fabrice Bailly, TF1 Group program and acquisitions



'A milestone of 2018 has been to maximize the distribution of our content on all screens. Last year, 1.4 billion videos were viewed on MyTF1. We have revised the partnership model with telcos distributors to ensure better remuneration for our contents and services. This makes possible to offer new viewing functionalities, as well as new services such as previews, binge viewing, sports events in UHD. We are redesigning MyTF1 to offer a consumer experience that meets current market standards that have evolved significantly with the arrival of new players'.

TF1's Pélisson has also fostered a new culture of alliance. Bailly says: 'Our alliance with France Télévisions and M6 in a common OTT, Salto, offering the live and replay of the three groups is a good illustration of the partnerships we are able to set up. The project is being examined by the competition authority now'.

'We are confident about the future of TV, which has no equivalent when it comes to creating social links and sharing with the audience, value for works and their creators. Over the past two years, our most challenging bets were our greatest successes. Our market is at a turning point and TF1 wants to be a key player in the transformation of the sector', concludes the executive.



The Mask Singer, a new phenomenon format



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ZDF Enterprises: 'We are always looking for new inspirations'

ZDF Enterprises was founded in the year 1993 as a 100 % private subsidiary of the German pubcaster ZDF, one of the biggest and most renowned television groups in Europe. On behalf of ZDF, the company is responsible for worldwide program distribution, the implementation of international co-productions, license purchasing for quality programs, marketing online rights and the merchandising of strong ZDF program brands.

All the operative divisions ZDFE.drama, ZDFE.junior and ZDFE.unscripted are organized in the way that they search for new projects and programs, conclude co-production deals and acquire program rights and handle the distribution of the respective programs.

'In 2012 we reorganized our structure in this manner and it proved this is most efficient', remarks Fred Burcksen, President and CEO. 'Genre professionals are in charge of the entire exploitation chain: from the program idea and development to the sale of the finished production, all in one hand. On average, we do around 20 co-productions per year and co-finance another 60'.

One of ZDFE.unscripted highlights is the 4K/UHD production *The Greatest Race*, produced by Lion TV (UK) in cooperation with

Smithsonian Networks, Channel 4, Arte, ZDF and ZDF Enterprises. 'Everybody knows the images of Roman chariot races from Hollywood classics like Ben Hur but hardly anyone knows the real story behind it', he describes.

In live-action kids' series, ZDFE is doing the third series of *The Worst Witch*. It's a BBC-CBBC project that was financed with the help of ZDF Enterprises and Netflix. 'It is a very original concept that all partners have approved. The series could have only been financed with all of these partners', adds Burcksen. Another example is a Canadian drama series by Pixcom Productions called *Victor Lessard*: it's based on a famous novel by Canadian author Martin Michaud that ZDFE picked up and it is going to make into a global success.

The executive highlights: 'We do not focus on specific territories but are open to partners from all over the world. We are always looking for new inspirations and are open to co-productions in all kind of countries. Entering new cooperation's is as important as continuing already existing successful cooperations'.

'We do not have a set way of doing business in any genre. It is all about finding the right mix, the right compromise and the best deal for all partners involved in a project. From the simple acquisition of distribution rights to complex coproduction agreements with many partners from all over the world, everything is possible.

We are very flexible when the objective is to enable the creation of a new project or partnership. It is all a matter of common sense and negotiations'.

ZDFE has made two important acquisitions last January: first, it had signed an agreement to acquire 100% of the shares in *Off the Fence B.V.*, a leading non-fiction content company based in the Netherlands, founded in 1994 by Ellen Windemuth that produces and distributes outstanding documentaries and series on a global scale; second, it has Nadcon production company from the legend Peter Nadermann, who has discovered series such as *The Killing* and *The Bridge* (aka *Bron/Broen*) for ZDF, which invested with ZDFE in both and helped them to global success. 'He had been with us, then left our group five

Fred Burcksen, President and CEO, ZDF Enterprises



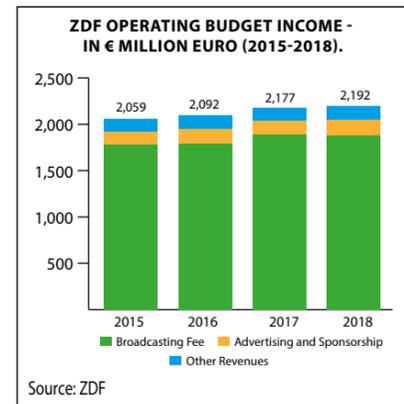
Drama series by Pixcom Productions *Victor Lessard* is based on a famous novel by Canadian author Martin Michaud that ZDFE picked



One of ZDFE.unscripted highlights is the 4K/UHD production *The Greatest Race*, produced by Lion TV (UK) in cooperation with Smithsonian Networks, Channel 4, Arte, ZDF and ZDF Enterprises

years ago, and we all thought it was time for us to work closer together again. He is well connected within the creative industry and has a talent for finding special content and for seeing trends in the drama genre. We are confident that we will come up with new ideas and create trends within this new cooperation', completes.

Regarding the coproduction business in the world, Burcksen states: 'It is all about financing projects with partners and in certain areas. There is an absolute need to find the right partners in order to get a project off the ground. Recently, there has been a greater acceptance for letting talent do their work. Co-production partners, whether networks or distributors are more willing to let writers and everybody involved in the creative process do their work; they don't try to exert too much influence. People are willing to look at original ideas no matter where they come from. That is a very positive element'.



TV Azteca, México: 'experiencias relevantes y diferenciadas'

A pesar del crecimiento de las nuevas plataformas de consumo, la TV lineal sigue más viva que nunca en América Latina. ¿La clave? reinventarse y apostar por las alianzas estratégicas para potenciar el contenido.

Un buen ejemplo de ello ha sido México, un mercado en el cual tan solo en 2018, 'tuvo un crecimiento de 2.7% con respecto al año anterior y, en él, **TV Azteca** creció 14%', según explica **Alberto Ciurana**, quien se sumó a Azteca en 2017 como director general de contenidos y distribución y con el fuerte objetivo de redefinir la estrategia del canal, con vista al crecimiento global y en todos sus frentes. 'El público mexicano pasa 4 horas y 12 minutos al día viendo televisión abierta, así que las posibilidades para colocar contenido son enormes', agrega.

De acuerdo con Ciurana, no hay duda que la audiencia busca nuevos contenidos, mejores; 'la forma de consumirlos ha cambiado'. 'El compromiso de TV Azteca es hacer la mejor televisión y ella está en hacer el mejor contenido. Nosotros lo hacemos de manera diferenciada: En **Azteca Uno** con programación en vivo llevamos los mejores realities para toda la familia y a través de **Azteca Siete** las mejores



series. Sabemos que la audiencia no quiere más de lo mismo y por eso en TV Azteca nos atrevemos a innovar constantemente en nuestra programación'.

Sin embargo, para Ciurana este crecimiento del consumo y acceso a nuevos contenidos ha generado un cambio en la exigencia a la hora de encontrar qué ver. Por este motivo, la compañía ha optado para adaptarse y, para seguir a la vanguardia, establecer nuevos acuerdos de coproducción y alianzas estratégicas nacionales e internacionales que les permitan estar al día en la oferta mundial y diversificar su oferta.

Gran ejemplo de ello es la alianza alcanzada con la turca **Acun Medya**, con quienes están produciendo todo el prime time de **Azteca Uno**. 'Estamos constantemente buscando traer los mejores contenidos del mundo para la audiencia mexicana', señala y destaca el lanzamiento de marcas como *La Voz*, *México Tiene Talento* y el suceso de *Exatlón*, que ha logrado posicionarse como el programa número 1 en expresión de demandas según **Parrot Analytics** durante agosto'. Del lado de la ficción también apuesta fuerte por las grandes alianzas, la rubricada con **Sony** y **Dopamine** para producir series premium.

'Durante el 2019 tenemos grandes lanzamientos frutos de diferentes coproducciones, ahora mismo tenemos *María Magdalena* que es producto de nuestra relación con Dopamine, casa del **Grupo Salinas** dedicada a la producción de contenidos de alta calidad para el mercado internacional, *Resistiré* con **Viacom (MTV)** y **Mega (Chile)**, que estará disponible a través de nuestra señal de Azteca Siete en México, pero al mismo tiempo mantenemos nuestras alianzas con marcas importantes como **Disney** que nos posicionan con la audiencia', enumera Alberto Ciurana.

Inspirado en el formato original de MTV, *Stranded With a Million Dollars*, *Resistiré* es un provocativo reality show de

Alberto Ciurana, director general de contenidos

TOP 5 DE GÉNEROS MÁS VISTOS DURANTE 2018					
TOP 5 DE GÉNEROS MÁS VISTOS DURANTE 2018					
GÉNERO	RAT%	RCH#	FID%*		
REALITY SHOW	3.81	5.32M	39.38	56.73%	43.27%
DRAMATIZADO UNITARIO	3.00	3.22M	46.66	66.17%	33.83%
TELENOVELAS	1.91	2.24M	43.76	66.69%	33.31%
DEBATE	1.73	2.92M	34.72	53.24%	46.76%
CÓMICOS	1.70	2.16M	41.45	59.97%	40.03%

Fuente: Nielsen IBOPE



Exatlón, formato de entretenimiento de Acun Medya (Turquía) que se ha convertido en suceso en la TV abierta de América Latina



María Magdalena, serie bíblica coproducida con Sony Pictures Television

supervivencia donde se ven a 24 participantes de América Latina y Europa poniendo a prueba su fortaleza, temple, lealtad y capacidad de sobrevivir al responder constantemente una pregunta: "¿Cuánto dinero estarías dispuesto a pagar para sobrevivir?".

Finalmente, en lo digital, también ha logrado posicionarse con una fuerte comunicación en sus redes: 'El Digital es el quinto canal de TV Azteca; es parte fundamental de toda nuestra estrategia, todos nuestros contenidos son pensados para tener un desdoblamiento en plataformas digitales. Queremos entregarle a nuestra a audiencia una experiencia relevante y por eso creamos contenidos espaciales como en *La Academia 24/7* a través de la app, el reality de *Venga La Alegría* y el reality de nuestro **Chef Benito**, de *MasterChef*', señala el ejecutivo y completa: 'en Azteca estamos abiertos a todo de tipo de alianzas con todo tipo de socios'.



MIPTV stand no. P-1.L2, P-1.M1



Nippon TV: 'Globalization and the evolution of the digital market'

Nippon Television Network Corporation has captured the annual viewer ratings "Triple Crown" for 2018 (All Day, Golden Time and Prime Time), marking the fifth consecutive year the company has earned this title, a record streak for all Tokyo-based commercial broadcasters. It reached 7.9% in the all day slot (6-12am), 11.6% in prime time (7-11pm) and 12% in Golden Time (7-10pm), according to Video Research data.

The company **Nippon TV** also celebrated its 65th anniversary as a broadcaster last year, and it has commemorated it with the show *65 Years of Television—The Power of Sports*, a collaboration with Japan's national broadcaster **NHK**. In addition, it also had special music programs and many other inspiring shows.

Atsushi Sogo, President, International Business Development, explains: 'Our stellar ratings are continuing in 2019 as we offer a larger array of high-quality content across multiple platforms that include our linear, broadcasting satellite (BS) and communications satellite (CS) channels, as well as **Hulu Japan** and our other digital streaming services'.

About the Japanese media market, the executive explains: 'The market and audience

behavior have changed significantly. The younger demographics in particular are shifting their viewer preferences and influencing the entire market. We have positioned ourselves well with **Hulu Japan** and are addressing their needs spectacularly, as proven by the latest upward trend in paid subscribers that was well beyond our goal. Basically, we achieved the March 2019 subscriber goals by the end of 2018'.

Regarding the strategy, he adds: 'What worked for us were the tie-ups with our linear TV shows that offered director's cuts exclusively on **Hulu Japan** and a special program on a hugely popular female singer. Another irresistible draw was *Way Too Kawaii!* which was first offered on OTT before TV. The drama series was consistently at the top weekly viewer rankings, but thanks to the social media posts of those who saw it digitally, we were also able to get good viewer ratings on our linear broadcast as well. Indeed, Nippon TV is winning the support of digital natives while finding the optimal symbiotic coexistence of our linear and digital platforms'.

Sogo: 'Ultimately, what viewers want is for us to exceed their expectations with new programs that they feel are worthy of their time. We are doing in-depth analyses on how best to synergize digital media and television so that we can formulate the most relevant strategies for the future'.

'The most important priority of the entire group has always been to continue improving our content production capabilities, and that is still very much true today. With opportunities in linear TV, digital platforms and international markets, our distribution channels will only keep growing'.

'It is therefore crucial to aggressively create content that will go beyond linear television and succeed in a diverse range of markets throughout the world. Globalization and the evolution of the digital marketplace are picking up pace, and Nippon TV is prepared to maneuver this enormous turning point', he completes.

Nippon TV has established a solid partnership with **Red Arrow** (Germany)

Atsushi Sogo, President, International Business Development, Nippon TV



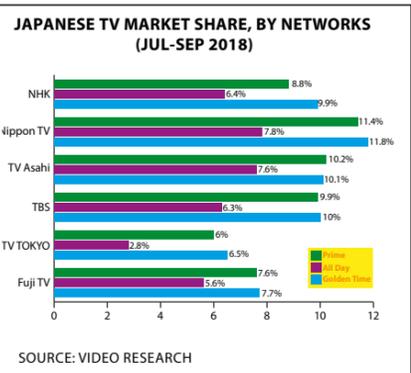
Way Too Kawaii! drama was first offered on OTT before TV



Nippon TV has established a solid partnership with Red Arrow (Germany) since 2015: the companies are releasing at MIPTV the new format Beat the Rooms

since 2015 and the companies are releasing at MIPTV the new action-packed new game show format *Beat the Rooms*: the Japanese company handles sales for Asia, and the European Studios is taking rights for the rest of the world. 'Our main objective is to always stay abreast of what audiences throughout the world want to watch so that we can continue expanding our sales opportunities', he adds.

Sogo concludes: 'We also have important partners in other Asian countries and the Western world to develop various business strategies. What we want to achieve with our partners is an understanding of the unique tastes of each region so that we can wholeheartedly lend our unparalleled production expertise to create the most relevant programs'.



Perpetual Grace, LTD (10x60')
Modern Noir Drama
James (Simpson), a young grifter, attempts to prey upon Pastor Byron (Sir Ben Kingsley) and Lillian Brown (Jacki Weaver), who turn out to be far more dangerous than he suspects.



Addams Family (Film)
Action Comedy
The Addams family's lives begin to unravel when they face-off against a crafty reality-TV host while preparing for a visit from their extended family. Premieres in U.S. October 11, 2019



TKO (Format)
Obstacle Course Competition
TKO pits one player racing through obstacles while four other contestants man battle stations along the course and fire projectiles in an attempt to knock them off and slow them down. The top two players advance to the final showdown to face off for a cash prize.



Get Shorty (27 x 60')
Dark Comedy
Miles Daly works as muscle for a crime ring, who for the sake of his daughter, attempts to change professions and become a movie producer, laundering money through a Hollywood film. But instead of leaving the criminal world behind, he accidentally brings it to Hollywood. Starring Chris O'Dowd and Ray Romano.



Creed II (Film)
Drama
Under the tutelage of Rocky Balboa, heavyweight contender Adonis Creed faces off against Viktor Drago, son of Ivan Drago. Stars Michael B Jordan and Sylvester Stallone.

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Kanal7 and the new Turkish media landscape

Turkey is an amazing TV market with 10 nationwide channels offering a wide variety of content. With the Turkish drama high impact in the global market, more TV channels are betting in this genre. This is the case of **Kanal7**, a private FTA channel that belongs to **Kanal7 Media Group** which also includes thematic news channel **ÜlkeTV**, satellite channel **TVT**, radio stations, AVOD platforms and news portals.

Founded in 1994, it has always aimed to be the voice of all colors of the country and the family channel addressing to the general audience offering from drama series, TV films, classical Turkish films, foreign movies/series to daily woman programs and documentaries.

'Media market is now very dynamic. As the production quality of drama series and entertainment shows has increased, the audience becomes to have a very high standard and taste for viewing TV. This makes the media landscape even more competitive', says **Yeşim Sezdirmez**, Head of Programming Planning and Acquisitions of **Kanal7**.

'Televisions and producers have to be open to new challenges in order to meet the expectations of such an audience', she

recommends, and she adds: 'In Turkey, digital media is growing so fast: ad investment for traditional TV was approximately 50% in 2017 and digital ranked second with its 26% of share. These results are competitive but television viewing still dominates'.

Even though time spent for digital viewing is increasing, traditional TV viewing is same for the last few years as the audience measurement data shows. However, viewers consume TV content as they wish: 'TV content through these streaming technologies has found a new way to reach audience. In addition, the VOD platforms becomes widespread in the country, but its content is mainly foreign which is preferred mainly by younger audience rather than general audience', describes **Sezdirmez**.

'When we launch a drama series, its success on our AVOD webpage **izle7.com** depends on its performance on TV. We observe parallelism between the two even though audience profiles of TV screen and digital are not similar to each other. As **Kanal7**, we acquire content for both due to a growing demand to watch through second screen and contribution to revenue generation', she explains.

Regarding the new season drama, *The Promise*, she says: 'A country girl who promises to marry the son of an old family friend after he reveals a terminal diagnosis. The heroine keeps her promise although her husband does not want to be part of this marriage and her mother-in-law does her worst to turn her life into hell'.

It is produced by **Karamel Yapım** and distributed by **Eccho Rights**. It has been 15 episodes until now: '*The Promise* has increased the average time slot share 25% and led to splendid audience reaction on social media and our digital platforms. It increased the number of visitors on our online live stream webpage by 76% and brought 31% new visitors. And its full episodes get into the trending list on **YouTube**'.

Another big show in Turkey and abroad is *Elif*, a long running daily series on its 5th season on air. New season has already been



Brand new drama series *The Promise*

commissioned. 'Till now, *Elif*'s performance is consistently doing great. It is the #1 series in Turkey and one of the most important in terms of international sales, having enjoyed already great success in Latin America and South East Asia distributed to almost 40 countries.

About what's working better now in Turkey, **Sezdirmez** says: 'Female and family-oriented dramas are the main focal point of Turkish TVs. The stories based on local, traditional and authentic feelings told by exquisite techniques of directing and producing get the viewers emotionally engaged with the characters of the drama, which makes Turkish series "Dizi" the most successful content both at home and in the world market. Entertainment shows as well because we are one of the most successful country when it comes to the adaptation of non-scripted formats and game shows of big brands'.

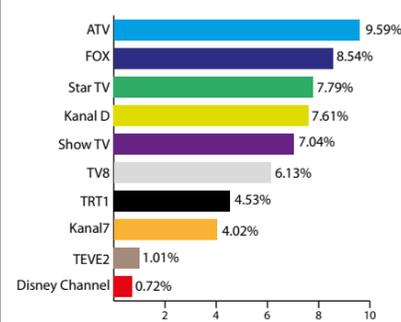
'As **Kanal7**, we invest more in drama, especially daily series which makes our position unique in Turkish market because we are the only TV channel airing daily series on prime time. This is our alternative strategy for highly competitive Turkish tv market which is dominated by weekly dramas'.

Future? She concludes: 'We concentrate on daily dramas, we don't have plans for weekly dramas yet. In terms of acquisitions, Indian dramas went well and we decided to be open to foreign content. We haven't done any international co-production before. But we have always been open to new experiences'.



Yeşim Sezdirmez, Head of Programme Planning and Acquisitions

TURKEY: AUDIENCE SHARE, BY TV CHANNELS TOTAL DAY, INDIVIDUALS +5 (2015-1Q 2019)



Source: TNS Kantar Media



CATCH!

60' entertainment format
Chase, tag, run – just don't get caught! Teams compete against each other in spectacular games to become the first ever champions of tag.



60' adventure reality format
The ultimate popularity contest in paradise – tribes of beautiful people compete to win new members to their apparently idyllic island communities.



60' entertainment format
Two families from different backgrounds switch spouses and navigate issues like politics, classism, gender and race.



60' reality format
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BY NICOLÁS SMIRNOFF

MIPTV 2019: A new global content market is taking shape

MIPTV is gathering once again the television programming world at Cannes, France, with two large attention issues: on the one hand, the evolution of the venue in itself, facing questioning by large brands that ask for changes in the cost-benefit relationship in order to continue attending. On the other hand, there is a thrilling transformation in the world market which, now with certainties and launching dates, is taking form and will fully develop in the future.



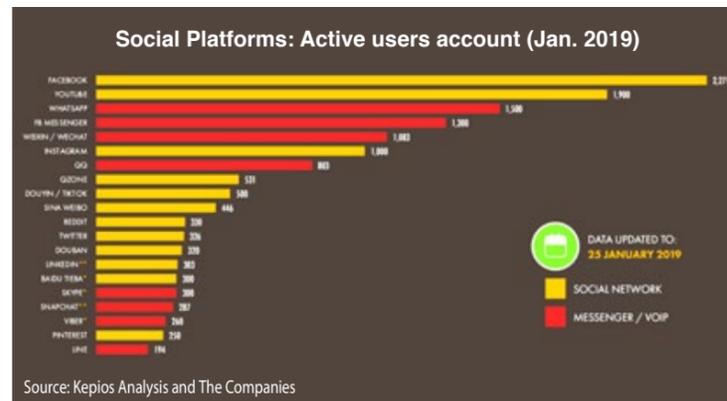
Peter Mercier, senior director, and Pedro Gutierrez, acquisitions, Microsoft Movies & TV, with Kate Coleman, head of content acquisitions, and Siena Pakingtong, general manager, BT TV, UK

The tech titans now live together at the content market with the broadcasters. In the new global OTT scenario, to handle strong own content sets up the rules

Regarding MIPTV, it's worth mentioning the two sides of the coin. On the one hand, organizer **Reed Midem** has made efforts to introduce reinforcing changes in the recent past, such as the adding of CannesSeries, bringing the glamour of movie festivals to TV and OTT; MipFormats, focused on production,

and other developments. Notwithstanding the protest of naysayers, MIPTV continues being the second largest venue of the year, doubling the number of participants that attend Natpe Miami or ATF, two other undisputable worldwide trade shows.

More changes are to happen this year. MipCancun and MipChina have proven successful in coordinating the sellers and buyers communities, with a high volume of business meetings scheduled according to the preferences



MIPTV 2019: el nuevo mercado global de contenidos toma forma

MIPTV vuelve a tener cita en Cannes, Francia, con dos grandes frentes de atención. Por un lado, la evolución del evento en sí, que es cuestionada por muchas marcas fuertes exigiendo cambios de costo-beneficio para seguir participando. Y por otro lado, la apasionante transformación del mercado que está tomando forma, ahora sí con certezas de estrategias y lanzamientos, de aquí a los próximos años.

De MIPTV en sí vale mencionar las dos caras de la moneda. Por un lado, la organizadora **Reed Midem** se ha esforzado en generar cambios en el último tiempo, como la adición de importantes eventos satélite para dar fuerza: CannesSeries, con el glamour del festival de cine llevado a la TV/OTT, MipFormats, el foco en producción y otros desarrollos. Por más que protesten los detractores, MIPTV sigue siendo el segundo evento mundial del calendario, con casi el doble de asistencia que Natpe Miami o

ATF, por citar otros eventos de relieve que no se discuten.

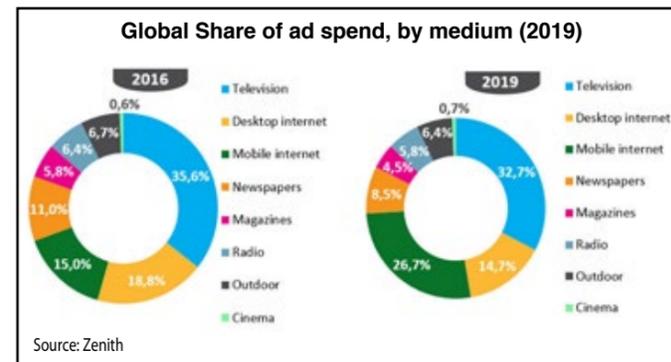
Nuevos cambios llegan este año. El formato de *MipCancun* y *MipChina* ha sido exitoso: coordinar comunidades de compradores y de vendedores, con volumen de citas pautadas a partir de las preferencias de cada uno. Ya se implementan acciones de este tipo en Cannes. como un comienzo de más que vendrá en el futuro.

Lo que dicen los opositores es que lo malo es la raíz actual del evento. Que ya no se puede cobrar igual que Mipcom cuando tiene un tercio menos de



Justin Rebelo, VP, and Mark Rodriguez, EVP sales, eOne (borders) with Travis Webb, director global acquisitions, and Ben Buchanan, senior manager, content acquisition, kids & family, Netflix.

The leading content retailer wants to be 'another linear TV' in the local markets, what it means to hold prime time, mainstream own products



stated by each side. This type of encounter is being tested in Cannes, as a starting point for what may become feature in the future.

What opponents argue is that the problem is about the roots of the venue; they disputing being charged the same as at Mipcom while their business volume is one third less than in October. They suggest changing the site, maybe the format but essentially modifying the pricing system; this, they say, because in addition to paying for the booths, there are travel, lodging and design expenses, among others.

What Prensario can say about this is that, without this venue, everybody will lose: vendors will be confined to show globally their product once a year instead of two, buyers will lose their chance to see their providers



German buyers: Vanessa Kinzel, group content acquisitions, and Christine Flickenschild, manager, both from ProSiebenSat.1, Michal Knoll, acquisition manager German speaking territories at NBCUniversal, Jan Endres, VOD development Telepool, and Achin Berheide, sr. manager acquisitions, at RTL2

Broadcasters turn to 'studios' — to produce multi-platform changing business models depending on the Project— and develop own OTTs to gain the OTT era in their own markets

and find new vendors and product in the Spring, the same will happen to the producers... These venues increase intake by themselves, just by allowing people to meet each other. The damage will be noticed later, over time...

The new market chart

Regarding the business in itself, the largest issue nowadays is its evolution to digital, as it's happening with everything else. The worldwide content market is changing from the traditional Movie + Free TV + Pay TV to a new ecosystem where the user has access to the content at any time, through any device and anywhere. Short time ago, the new top players map remained a mystery. Now it is known what will happen: the largest media groups will have their own OTT streaming services in order to reach the final customer without middlemen. And the broadcasters will become studios, to produce multiscreen content with business models adapted to the partners at each project.

It is estimated that there will be between eight and ten 'global OTT's', related to the largest media groups in the world. Each of them may operate several systems at the same time, according to its market targeting goals. In addition, the



Globo and Telemundo vuelven a coproducir con 'Jugar con Fuego', proyecto en el que también está involucrado Netflix: Marcos Santana, presidente de Telemundo Global Studios, and Mónica Albuquerque, CEO de Globo Studios rodeados de Silvio de Abreu, head of drama and comedy, Globo; José Luiz Villa y George Moura, autores y escritores, y Carlos Henrique Schroeder, CEO, Globo

Las coproducciones son máxima prioridad en América Latina, porque permiten desarrollar productos high-end compartiendo costos y abriendo mercados. El modelo de 'estudios' se fortalece en base a ellas

movimiento, y tal vez la solución pasa por mudar la sede, cambiar el formato pero sobre todo cambiar el esquema de costos. Porque aparte de lo que se paga por los stands, etc., está el gasto de viajes, alojamiento, diseño, etc.

Lo que puede decir PRENSARIO es que si el evento cae, pierden todos: los vendedores que mostrarían sus productos a nivel global una vez en lugar de dos en el año, los buyers que pierden el encuentro de primavera, los productores lo mismo... los mercados generan consumo per sé, por tener a la gente de la industria reunida. El gran daño se va a ver cuando el evento no esté, con el tiempo...

Lo que habría que hacer —fácil de decir, difícil de concretar— es buscar una combinación que deje a todos contentos. Si cada lado deja su posición radical e intenta entender la del otro, pueden, deben surgir buenas soluciones. Ojalá se de. El evento viene problemático hace



Japanese broadcasters at the Palais: Makito Sugiyama and Tatsuo Sugai, TBS; Ken-ichi Hirose, Nippon TV; Yasuyuki Tazawa and Junko Abe, TBS; Shigeko Cindy Chino, Kako Kuwahara and Atsushi Sogo, Nippon TV

Japan is taking more relevance at the international cross-region ventures. The broadcasters are more open to coproductions and develop 'out of the box' formats

media groups in each nation or region are launching their own systems, which will result in market shares depending in each place on the relative force of local content.

The **Disney-Fox** OTT, for instance, will be launched between the end of this year and 1Q2020, with three 'flavours': **Hulu** for the unbranded content, **Disney+** for branded —**Disney, Pixar, Marvel, Lucas**— and **ESPN+** for sports. And, here we have

años, y hasta ahora se han reforzado más las posturas antagónicas que los acercamientos.

El nuevo mapa del mercado

Yendo al negocio, el gran tema es la transformación digital, como en cualquier ámbito de la vida cotidiana hoy en día. El mercado de contenidos pasa del tradicional esquema de Cine + TV abierta + TV paga, a un nuevo ecosistema donde se puede acceder a los contenidos en cualquier momento, lugar y dispositivo. Hasta hace poco era un misterio cómo sería el nuevo mapa de players, hoy ya se sabe lo que viene: los grupos máximos

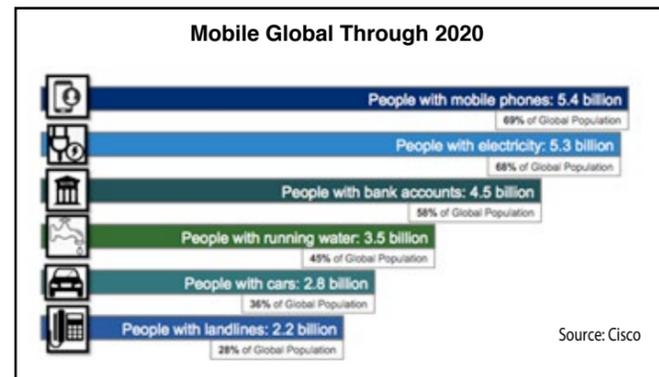


Patricio Wills, presidente de Televisa Studios, con Emilio Azcárraga, CEO de Televisa, y Eduardo Clemesha, director de entretenimiento, junto a la actriz Itati Cantoral

Los broadcasters de América Latina se vuelven 'estudios', para producir para propios y terceros, en cualquier plataforma y modelo de negocio. En enero, Televisa se ha relanzado al mercado internacional con este formato

another disruption: the studio has decided that it will not license its branded —and most appreciated— content to third parties, after the OTT has been launched. This heralds a change in its world distribution structure, which will market only unbranded content, such as the titles produced by **ABC Studios, FreeForm** and other outlets, plus local production. That's why the studio has started producing regional series, which may be channeled to **Hulu** but will have more field to handle.

Warner Media will launch its OTT in 2020, after joining **AT&T** and including **Turner**. At present it faces a similar uncertainty, its executives being instructed to avoid long-term arrangements, in order to have freedom for decision when the future outlook is defined. In addition, there are



de medios teniendo su propio OTT para llegar directo, sin intermediarios al público. Y los canales de TV más medianos transformándose en estudios', para producir multipantalla con modelos de negocio que varían según el partner de turno.

Se calcula que serían de ocho a diez los 'OTTs globales', respondiendo a los grupos principales de medios del mundo. Cada uno puede tener varios sistemas a su vez, según targets de marketing. Y luego los grupos de medios de cada país o región están lanzando sus propios sistemas, generando market shares distintos en cada lugar dependiendo de la fuerza de su contenido local.

El OTT de **Disney-Fox**, por ejemplo, se lanza entre fines de este año y el primer Q 2020, con tres sabores: **Hulu** para el material no brandeado,



Mega (Chile), Viacom Telefe (Argentina) e Imagen TV (México) lanzan su primera coproducción conjunta, '12 segundos'. Juan Ignacio Vicente, gerente de contenidos y negocios internacionales, Mega, Aurelio Valcárcel, head of fiction, Imagen TV, Darío Turovelzky, SVP Global Contents, y Guillermo Borensztein, director de coproducciones, ambos de Viacom Telefe; Adriana Ibáñez, Chief Content Officer, Imagen TV, Patricio Hernández, CEO, Mega, y Suzzete Milló, marketing & contents, Imagen TV

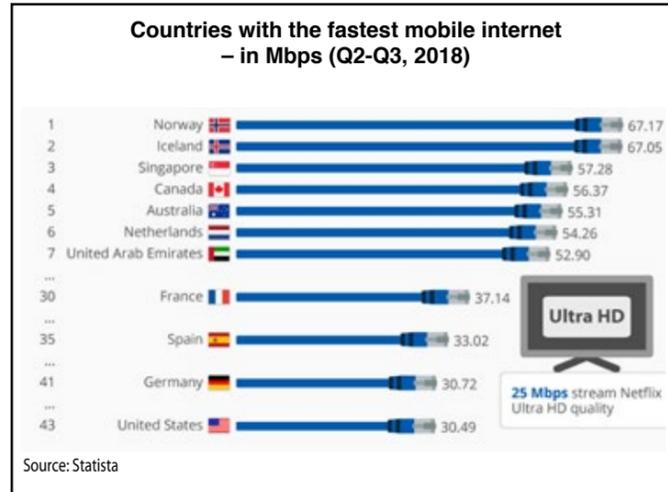
Están surgiendo coproducciones donde participan hasta 3 o 4 players grandes. Suelen ser medios complementarios, pero a veces directo participan varios broadcasters líderes





Alex Zlatanova, Fox CEE, with HRT Croatia: Lidija-Katarina Matancevic, producer, Ranka Horvat, acquisition manager, Branka Papi, editor buyer, Igor Tomljanovic, selector/buyer

The CEE region is better and strongly developing digital platform. There are very good opportunities on coproduction ventures



regulation issues in some countries, due to the market share to be attained by the unified enterprise. **NBCUniversal** is launching its own OTT in Europe this Summer, including **DreamWorks** and other brands; in other regions, such as Latin America, it has large broadcasters, **Telemundo** among them.

How are **Netflix**, **Amazon** and other 'pure' OTT's reacting to this? In the same manner, focusing mostly on the production of local series in each region or major country. **Netflix** has once and

again voiced its desire to become a linear TV network in each market, which actually means it aspires to offer local content enough relevant to move users to look for it, as traditionally done with broadcast TV channels. All in all, for both the large studios and the medium-sized TV networks the development of original content is no longer a strategy but a survival issue. It is what they will have to do, otherwise they will have no content to offer.

Will it be necessary to sign up for all these global OTT's—the studios'

Disney+ para el brandeado —**Disney**, **Pixar**, **Marvel**, **Lucas**— y **ESPN+** para deportes. Y aquí una segunda disrupción: el estudio decidió que una vez hecho el lanzamiento, ya no venderá a terceros el material brandeado, que es el estrella. Esto genera un quiebre para su estructura de distribución mundial, ya que sólo le quedará el material no brandeado, como **ABC studios**, **FreeForm**, etc., y sobre todo la producción local. Por eso resultan claves las series regionales que el estudio ha comenzado a generar, que irían a **Hulu** pero con más campo por manejar.

Warner Media lanzará su OTT en 2020, tras unirse a **AT&T** e incluyendo **Turner**. Hoy está en una incertidumbre parecida: sus ejecutivos de venta reciben la normativa de no hacer convenios largos, para tener campo abierto de decisiones cuando se aclare el

panorama. Aparte en algunos países hay problemas de regulación, por el share de mercado que toma la nueva empresa unificada. **NBCUniversal** está lanzando este verano boreal su propio OTT a Europa, incluyendo **Dreamworks** y otros sellos. En regiones como América Latina, tiene incluidos grandes broadcasters como **Telemundo**.

¿Cómo están reaccionando **Netflix**, **Amazon** y los otros OTT's 'puros' actuales? Igual, destinando máximo foco a la producción de series locales región a región. Un anhelo dicho a viva voz por **Netflix** es convertirse en una TV lineal más en cada lugar, que en realidad significa manejar material local tan relevante que el usuario lo busque como hoy busca a los canales abiertos. Llegamos a que tanto para los grandes estudios, como para los canales medios, como para los gigantes OTT,



0098- OTT's protagonistas: Fernando Magalhães, director de programación de NET Brasil; Alberto Islas, director de contenidos, Jennifer Barany, directora de adquisiciones, y Roberto Rosales, gerente general, todos de Clarovideo; Pablo Iacoviello, head of Latin America, Amazon Prime Video; y Guto Clark, head of mobile business development, Amazon

Los titanes online de América Latina tienen como prioridad manejar contenido local, siendo un motor para producciones originales novedosas. Necesitan producto para cuando las majors lancen sus propios OTT's



La Asociación de Distribuidoras Latinas: Nicolás Smirnoff de Prensario, Cristhin Martínez de Televisa, Manuel Martí de Polka, Alejandra Moreno de Globo, Patricia Jasin y Andrés Rico, ambos de TV Azteca, Guadalupe D'Agostino, de RCTV, Ramón Salomón, de TV Azteca, y Ana Sánchez y Martha Contreras, ambas de Comarex. También participan Caracol, Viacom/Telefé, Glowstar y otras empresas

Las distribuidoras de América Latina buscan que el producto de la región tenga un nuevo posicionamiento, lejos de las tradicionales telenovelas y destacándose por calidad de producción y argumentos innovadores

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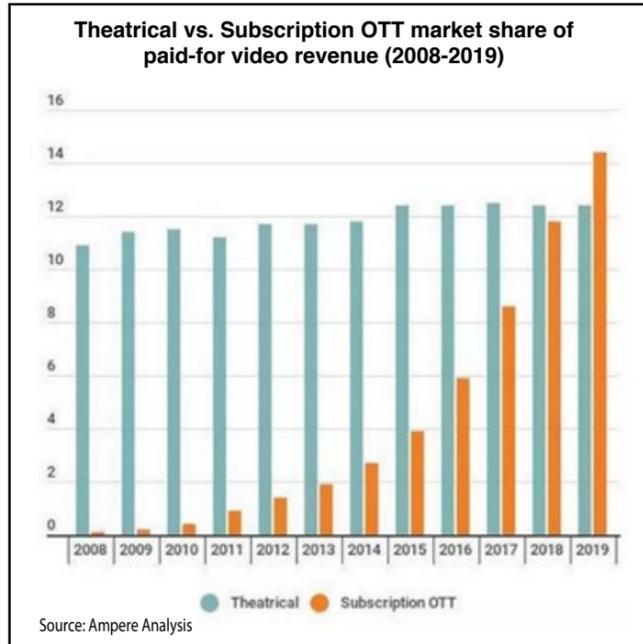


Three Asian broadcasters: Phan Hong Ling, director, Thaole (Vietnam), Cory Vidanes, COO, and Winess Lee, program acquisitions officer, both from ABS-CBN (The Philippines), Joy Olby-Tan, VP acquisitions from Mediacorp (Singapore), Maria Cecilia Ferreros, VP, integrated program acquisitions at ABS-CBN, and Andrew Tran, head of technical ops, Thaole

South East Asia is in a good moment for international initiatives. Governments push production hubs and strong players want to grow overseas

plus Netflix, HBO, Amazon, Apple and so on-- to be able to watch the prized content? These players are planning to offer their systems for monthly fees between US\$ 7 and US\$ 15. If users sign up for 6 to 7 of them, they will end paying US\$ 90 to 100 per month, plus the Internet connection. This is more or less what is being paid on a worldwide level for about one-hundred linear pay TV channels.

But, a new media category is emerging: the "aggregators", offering bundles tailored to more specific preferences. For instance, you'd obtain, for US\$ 15 per month, parts of 2-3 OTT's, bypassing the already mentioned count. The systems would not block these aggregators in order to remain competitive at the (savage) positioning war that will happen from now on. At these "aggregators" it will be possible to scale up or down the content



requested, as it happens at the Disney World thematic parks. Will there be business enough for all parties currently involved? The good news about the new model is that it features fewer physical restraints than the older one, where, in a country with 2-3 dominant TV channels already controlled, there was no way for an entrant to achieve massive rating figures. But, as it happens with all things online/global, competition will be fiercer, and anyone can become a competitor. Any recipe for this? As always, it is suggested to rely on basics: bet strongly but remain realistic, with the feet on solid ground; develop good product, stay on your customers' side. The rest will come by itself.



HBO Latin America: Roberto Hernández, corporate VP, Luis Peraza, VP de producción original, Silvia Fong, programming director Max Networks, Danny Zambrano, senior manager programming, Gustavo Grossman, VP corporativo de Networks, Jesús Rodríguez, producción y operaciones, Marienri Miethe, programming manager de Cinemax, y Eva Villarreal, programming director of Max Networks

Los gigantes del Pay TV se están transformando para la nueva era OTT: oferta mainstream no lineal y producciones originales high end

generar producto propio no es sólo cuestión de estrategia, sino de supervivencia. Es lo que tienen que hacer para poder competir, sino se quedan sin producto.

¿Habrá que contratar todos estos OTTs globales —los de los

estudios más Netflix, Amazon, Apple, HBO, etc.— para acceder a todo el contenido cotizado? La idea de estos players es ofrecer sus sistemas desde USD 7 a USD 15 como fee mensual. Si el usuario contrata 6-7 de ellos, pagaría USD 90/100 al mes, lo mismo que hoy se paga en promedio por el abono a la TV paga, con un centenar de canales lineales.

Pero ya está surgiendo un nuevo rubro de medios: agregadores que ofrecen bundles a medida. Por ejemplo por USD 15 al mes, partes de 2-3 de estos OTTs, lo que permitiría al usuario sortear la cuenta anterior. Los sistemas no bloquearían la opción, con tal de imponerse en la batalla de posicionamiento (salvaje) que comienza. En estos 'agregadores' se pueden hacer escalas de ofertas sumando o quitando atracciones, como cuando uno va a los parques temáticos tipo Disney World.

¿En este nuevo mercado va a haber negocio para todos? Lo bueno que tiene es muchas menos limitaciones físicas que el modelo del pasado, donde si en un país los 2-3 principales canales estaban tomados, no había forma para un entrante de alcanzar ratings masivos. Pero cómo en todo lo online/global, la competencia es más encarnizada, porque todos pueden ser competidores. ¿Alguna receta? Como siempre, vale apoyarse en los basics: apostar fuerte pero con los pies sobre la tierra, crecer pero seguro, generar buen producto, ponerse del lado de los clientes... y el resto se irá dando.



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Merges and fusions: the industry reconfigures

With the merges of titans Disney/FOX and AT&T/Time Warner, the market has started to change its landscape giving a new dynamism to the whole ecosystem. Even when we are talking about something that started about a decade ago, to each fusion, a larger one follows with the goal of not losing footprint.

Comcast

At 2009, Comcast surprised the industry with the intention of buying most of the shares of NBCUniversal from General Electric. It was the first major acquisition and merger of means on a planetary scale. The historical context was another: Comcast was the leading cable provider in the USA at that time, and managed channels such as E! Golf Channel and Versus, which later became part of NBCUniversal's signal portfolio.

This acquisition was finally confirmed two years later and meant a series of internal changes within the conglomerate that were taking shape in recent years with, for example, the definitive absorption of Telemundo by NBCUniversal. The operation of the second Hispanic network in the USA and all its international distribution business (Telemundo Internacional) remained in the hands of the corporate structure.

Sky's case is interesting: in September 2018, Comcast / NBCUniversal exceeded 21st Century Fox's offer for a stake in the British operator's control for USD 38.8 billion. In this way, Fox ceded its 39% stake in this company to Comcast for USD 15 billion, which will allow it full control, and was left out of The Walt Disney Company's orbit.

Disney

The Walt Disney Company is a corporation that does not stop. It already operates ESPN+ in the USA for more than 1 million customers, and plans to launch it as a global sports OTT this year along with its expected Disney+ that will have content from Disney, Marvel, LucasFilms, Pixar and ABC, but also from FOX and its brands, after the acquisition of 21st Century FOX for USD 71,300 millions. Studios, Premium brands and digital strong has been his formula since 2006 when he bought Steve Jobs animation studio Pixar, and in 2009 with Marvel, finally in 2012 to stay with LucasFilms. Those stamps gave him an unusual strength that, now with FOX, will completely change the stage.

To understand the magnitude, the contents are a good parameter: Disney obtains film and TV studios (20th Century Fox, Fox 2000, Fox Searchlight), as well as the cable an international businesses, but separating the networks and stations that will be in hands of a new company; large franchises such as X-Men, Avatar and Deadpool, or The Simpsons, This Is Us and Modern Family. In the US it controls the majority of Hulu (60%), also participated by Comcast / NBCUniversal (30%) and WarnerMedia (10%).

Internationally, the purchase allows you to manage 350 channels in 170 countries, including Star India, Tata Sky; FX and NationalGeographicPartners; Endemol Shine Group.

Bob Iger, CEO of The Walt Disney Company confirmed that Disney+'s structure will be five blocks of main content within the service that revolve around Disney



(TV and movies), Marvel, StarWars, Pixar and NationalGeographic. The application will offer five different user experiences, with a personalized aspect and particular characteristics, for each of these five content universes, said the press.

AT&T

The competition was immediate and for the same time the US telcos giant AT&T, which had already acquired pay TV operator DirecTV with operations throughout the Americas, confirmed the offer of USD 85,000 million by TimeWarner, renamed as Warner Media. In this case, it is a telecommunications giant that leads the subscription market with DirecTV and, which needed powerful brands to compete in the new ecosystem: the Warner Bros., HBO and Turner Broadcasting System, among the most important and with a global presence.

In the US, AT & T has 16 million Internet

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World premiere of brand new formats from major TV broadcasters

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Bob Iger (Disney) shakes hands with Rupert Murdoch (Fox) on the roof of the offices of the Australian magnate in London, consolidating a new global media and entertainment scene

Merges and fusions: the industry reconfigures

connections and 47 million video connections through **DirecTV**, **DirecTVNow** (1.8 million, 2Q 2018) and **U-Verse**; 163.2 million AT&T wireless subscribers adding up to Mexico, and 400 million people in both markets that access the 4G LTE network. **DirecTV Latin America** has 21.6 million pay TV subscribers (3Q, 2018).

At the end of 2018, AT&T president and CEO **Randall Stephenson** signaled that it will put into operation a 'new arsenal' of media properties and indicated that by the end of 2019 a three-tier streaming service will be launched to compete with Netflix. One of those new products will be a plan just for movies; another will have original programming and big box office films, while the third option, and the highest cost, will combine content from the first two plus the WarnerMedia library and licenses from other companies. According to AT & T, these three options will 'complement' the current WarnerMedia business: 'They will benefit our current distribution, expand the

audience, increase engagement around the content, and provide data and analysis that will inform on the operation of those products, improving monetization. ' he assured.

John Stankey, CEO of WarnerMedia, said the new streaming will use HBO content, Turnery Warner Bros. to expand the demographic base: 'We want more content and generate more relationship through digital content.' He also announced that this content will be limited in other platforms: "We are analyzing our next steps in the next two years, where we will suffer several structural changes will happen," he added.

The moment of the Indies

But all this merges push not only the ecosystem in the "high ground". For the last 5 years, indies starting to move, leading the birth of new production titans.

1.	Apple	\$1.09 TRILLION	7.	Verizon	\$221 BILLION
2.	Amazon.com	\$983 BILLION	8.	Walt Disney	\$174 BILLION
3.	Microsoft	\$876 BILLION	9.	Netflix	\$165 BILLION
4.	Alphabet	\$834 BILLION	10.	Comcast	\$163 BILLION
5.	Facebook	\$481 BILLION	11.	Fox	\$86 BILLION
6.	DirecTV	\$244 BILLION	12.	Charter	\$75 BILLION

Source: figures of the stock market

Apollo and **21st Century Fox** launched in 2015 **EndemolShineGroup** with +120 production companies worldwide, and managing 55,000 hours of finished content and 4,321 formats, which reach an online audience of 2.7 billion views per month.

The other big one is **ITV Studios Global Entertainment**, part of the British private group **ITVple** which handles 40,000 hours of TV and film content and has production companies in the UK, Australia, Finland, France, Germany, Norway, Sweden and the USA. Two months after the launch of **EndemolShineGroup**, acquired **John de Mol's Talpa Media BV**, for € 500 million adding more than 75 shows on the air in 180 countries, with 16 new formats only that year.

Controlled by **LOV Group** (Stéphane Courbit) and **DeA Communications** (61.9%), **Vivendi Francia** (28.4%) along with other shareholders (9.7%), the third biggest is **Banjay Group**, which took a larger Global reach after the acquisition of **Zodiak Media** (UK) in 2016. It has a slate with over 20,000 hours and 61 production companies in 16 countries. **Fremantle Media**, recently rebranded as **Fremantle**, has 31 offices in the world and handles about 12,000 hours of programming and 450 shows developed, representing 100 billions of views in **YouTube**.

Later 2018, **ITV** and **Banjay Group** started to show interest on acquiring **EndemolShineGroup**. But after knowing the refusal of the first of them, the group led by Stéphane Courbit and Marco Bassetti, sought to take over the assets of the global giant, with operating income of USD 2,120 million.



MIPTV BOOTH P0.B1

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WE DO BETTER



Ups & Downs by regions: an industry in continuous change

In this ever-changing industry context, Prensario summarizes the most important news & trends, analyzing region by region: Europe, Latin America and APAC. There are three big coincidences: 1) an increasing OTT offering; 2) more own IPs and original programming; 3) the search of strategic partnerships and co-productions.

Europe

The biggest OTTs like **Netflix** and **Amazon** are positioning themselves in the continent, in part because they have been obligated by the new European normative to produce at least a 30% of their programming offer in the territory. The first step has been to organize and launch local offices that are able to produce scripted and non-scripted content.

In the case of **Netflix**, the most important news has been the construction of a Spanish-speaking content production hub at Ciudad de la Tele, Madrid, along with **Secuoya Group** that is about to be launched this month. From there, the largest global SVOD expects to produce over 40 series a year for the Ibero-American market.

Major OTTs have found that the only way to compete with a largest number of local digital platforms is the original and local production. And entertainment has become a key asset in this strategy, especially in Europe. In some cases, they want to compete like they were another linear TV channel in the territory with highly competitive contents.

Netflix, **Amazon** and other local OTTs

are very special windows in this moment for most of the European producers. First, because they are able to attract audience that is leaving linear TV: this young audience, which embraces social media, believes in innovation and it is 'desperate' for new and fresh programming that fulfills their tastes.

It is definitely a wider, general audience that likes entertainment and emotions, apart from documentaries and drama series. OTTs have revolutionized the scripted and they are now going after the unscripted: they want to recover the spirit of when the 'big formats' were born: *Big Brother* or *Survivor*.

Second, apart from different and varied entertainment formats, they focus on personality shows, more emotional programs mixing comedy and celebrities. They aim for products that resonate in the local territory and, in some cases, can travel abroad. And third, they are considering adapting some IPs that they already have, as for example, *The Grand Tour* (**Amazon**), *The Circle*, *Queer Eye* or *Haunted* (**Netflix**).

On the other side of the table, generalist and conventional TVs keep seeking for big

entertainment formats for prime time, but the offer is not being able to satisfy that strong demand. This is why some of the biggest European broadcasters have started to develop, produce and distribute entertainment



Big Brother: Over the Top was a standalone show exclusive for CBS All Access. OTTs are now increasing the non scripted format production for the European territories

format within the international markets. While this context is taking shape, they chose 'safe success': *Big Brother*, *The Voice*, *Your Face Sounds Familiar*, *Masterchef*, among others.

Latin America

The digital business has made a strong impact in the traditional business in Latin America and the biggest players are now emerging again from that 'experience' with the best receipt: more valuable production.

The big news since the beginning of the year has been the return of **Televisa**, after two years of restructuring and deep changes. Last NATPE Miami, **Emilio Azcárraga Jean**, executive president of the board of directors summarized the moment of the largest Spanish-speaking audiovisual producer: 'Our transformation is from the root: we have transformed from a TV group to be "studios" with strong focus in co-productions (15 of them are being developed), third-party production and multiplatform creations, including alliances with the main OTTs. Now we are in sync with the industry moment'.

Patricio Wills, president at **Televisa Studios** presented 20 projects that night: 'The idea is to renew and innovate, but at the

same time returning to the primary values of **Televisa**. We have long series, short formats, entertainment, sitcoms with US-budgets, and "La Fabrica de Sueños" (The Factory of Dreams), where we re-designed our most successful classics, such as *Los Ricos Tambien Lloran*, *Rubi*, *La Usurpadora*, etc. in 25-episodes with huge budgets'. Among the top shows launched are the sci-fi telenovela *Amar a muerte*, the biopic *Silvia Pinal*, and *La Reina soy Yo*, de reggaeton, as well as **Arturo Perez-Reverte** last success *El Ultimo Dragon*'.

Another big player that has been strengthening its position is Brazilian **Globo TV**. The company doubled the executive presence at its traditional NATPE Miami kick-off breakfast, where its top management presented the shows themselves. They also announced a new co-production with **Telemundo**: *Jugar con Fuego*, premiered during the first day of the market.

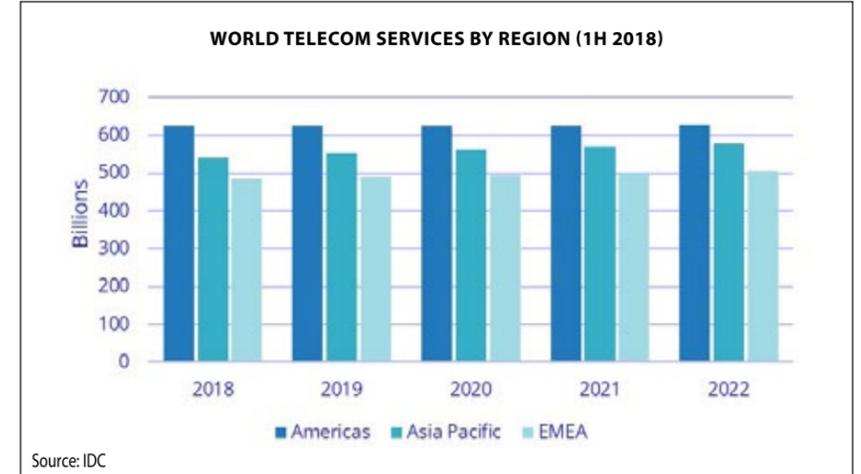
Carlos Henrique Schroeder, CEO, highlighted the power of **Globo TV** connecting 100 million people every night, and another million viewers worldwide. 'Our doors are now completely opened to the future. Our main strategy for a TV show is the emotion and if we are able to connect with the audience, we'll have a secured success'.

'We went through a big transformation the last years, whose main conclusion has been: we need to produce beyond Brazil. We are now a stronger studio, ready to develop content in different formats, topics and platforms', added **Monica Albuquerque**, head of development, **Globo Studios**, who finalized explaining how this division analyses the new audiovisual consumption behaviour and how these data apply to the development of new projects.

On the international side, key Latin distributors are forming an association to reinforce the presence of Latin America in the key global tradeshows. A strong push has



Big media groups from Latin America and the US Hispanic continue to exploring partnerships and coproductions like the one announced last NATPE Miami by **Globo TV** and **Telemundo**: *Jugar con Fuego*, based on the Brazilian scripted formats *Amores Roubados*



been made in Miami and now is the turn of MIPTV, followed by LA Screenings, NATPE Budapest and MIPCOM. Key members such as **Globo TV**, **TV Azteca**, **Pol-ka**, **RCN**, and **Telemundo**, among many others, are together to elaborate and design the administration of the new association with a general staff and the main strategies to concrete progressive actions in the marketplace.

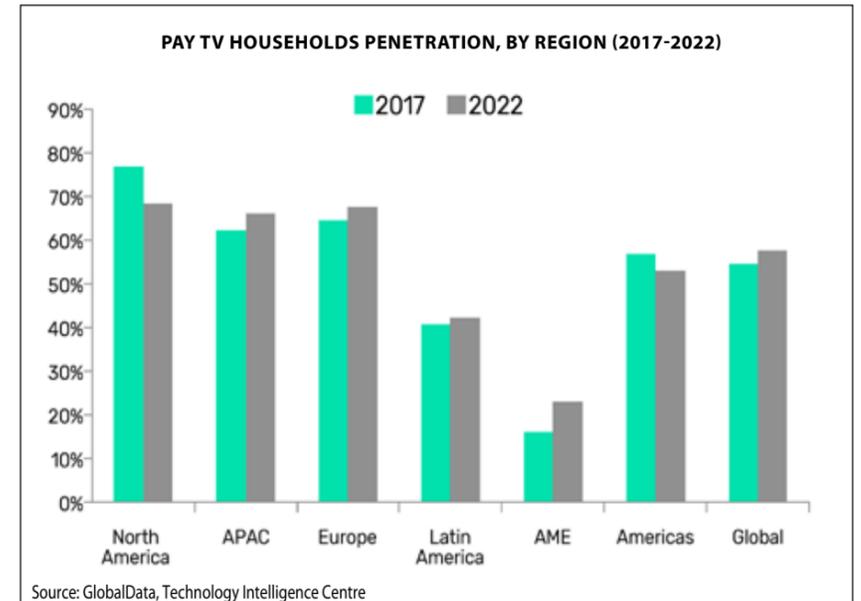
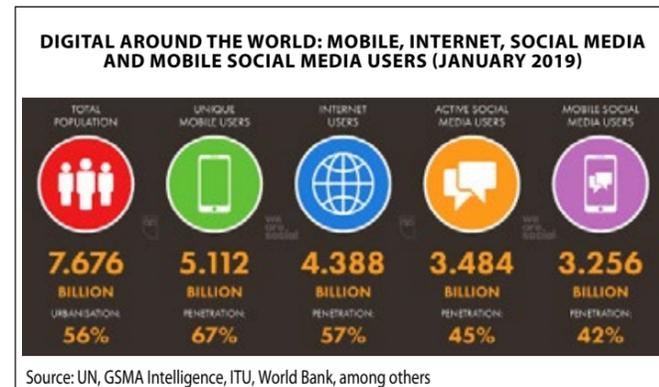
A strategic meeting is taking place this MIPTV with **Reed Midem**, as well as a special presentation at LA Screenings, academic panels at NATPE Budapest, and social events planned for MIPCOM and MIP Cancun to allow the networking with global heads of programming and acquisitions.

What are the Latin American buyers looking for? **Marcelo Tamburri**, **Turner**: 'New stories. The old is a narco-series that kill lots of people and it is glorified; the new

is exploring different emotion, and go back to the emotions and inter-personal relations'. **Paula Kirchner**, **Viacom/Telefe** (Argentina): 'Solid and innovative formats like *The Voice* and *MasterChef*, which every year show a twist. When they focus in family, they just work'.

Andrés Guerra, **Unitel** Bolivia: 'Transversal products that take all the audiences at the same time'. **AnnaMaría Kafati**, **Televisión**, Honduras: 'Content that allow us to finish with piracy in our countries: real and more popular stories, more fun, less drama'. **Patricio Hernández**, **Mega** (Chile): 'Daily entertainment shows'.

Adriana Ibáñez, **Imagen TV** (Mexico): 'Dramas from new origins: we've innovated with China and others, after the Turkish success'. **Jimmy Arteaga**, **WAPA TV** (Puerto Rico): 'Entertainment formats to develop



Ups & Downs by regions: an industry in continuous change

and produce in our market'. **Edna Orozco, RCN** (Colombia): 'Good stories, key for the survival of Free TV nowadays'.

APAC

If the global industry is changing rapidly, APAC shows the fastest and deepest transformations: not only in digital and technology-based developments, but also in the format, kids and drama businesses. Everything is constantly moving here, and ATF has reflected that move and the future to come... soon.

Digital continues to take the attention. **IHS Markit** reported that native digital companies drive the APAC OTT market, and that China takes the majority of the pie in terms of subscribers (75%): among the 10 most important Pay TV and OTT platforms, three of biggest are **Tencent, Baidu** and **Youku** (+130 millions subscribers).

When China is out of the chart, Japan, India and Australia are the main ones. The first one is a very sophisticated market with more and more players being launched. Pay TV takes



In APAC, traditional and digital companies are already working together: on April 2018, HBO Asia and Hulu Japan did a simulcast premier in both platforms across 20 territories of *Miss Sherlock*, an eight-part hour-long original Japanese drama series

the lead, and Netflix was too late in a well-established market, and **Amazon** and local **GYAO** surpass it.

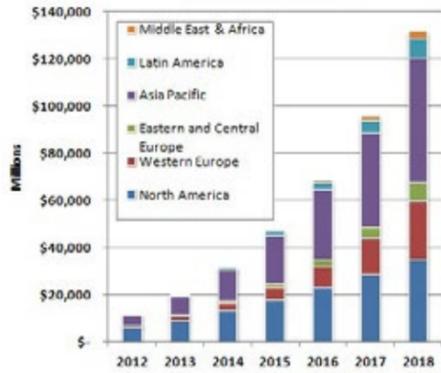
The mobile-first market India has become a hotbed for domestic and international players. Local and regional content is key to lead in this diverse market. Here, Amazon and **Netflix** face fierce competition from strong local players **Star's Hotstar** and **ZEEL's ZEE5**.

As a key English-speaking APAC market, **Netflix** has seen rapid growth in Australia with an increase in local content. Stan, its stronger competitor reached +1 million subscribers (H1, 2018), and **Foxtel Now** differentiated themselves because of the local content they produce and offer.

When analyzing the key assets, the region shows dynamism and innovation. About the first, Asia is moving fast, along with the global changes. More producers, developments and new platforms are raising more business. The buyers search for the product that makes the difference, while competition increases in most of the APAC markets; sellers are diversifying its programming offer to reach a wider number of clients and audiences.

About the second, there are shorter contents, 4K, virtual reality. Asia is an enormous land of content that is travelling within the continent, and abroad. Japan took the lead with scripted formats; Korea is pushing innovative animation; and China is heavily investing in co-productions. Technology is shifting the

OTT INTERNET TV SERVICES - REVENUES IN USD MILLIONS (2012-2018)



Source: Generator Research

programming offer and content distribution, while new business models are arising.

About trends, APAC is so vast that it is difficult to pronounce a general concept that covers all the territories. According to a **PRENARIO** research conducted last ATF in Singapore, while Korea and The Philippines prefer the romantic series, Thailand and India are producing more supernatural/mystery dramas, and Malaysia and Brunei, horror productions.

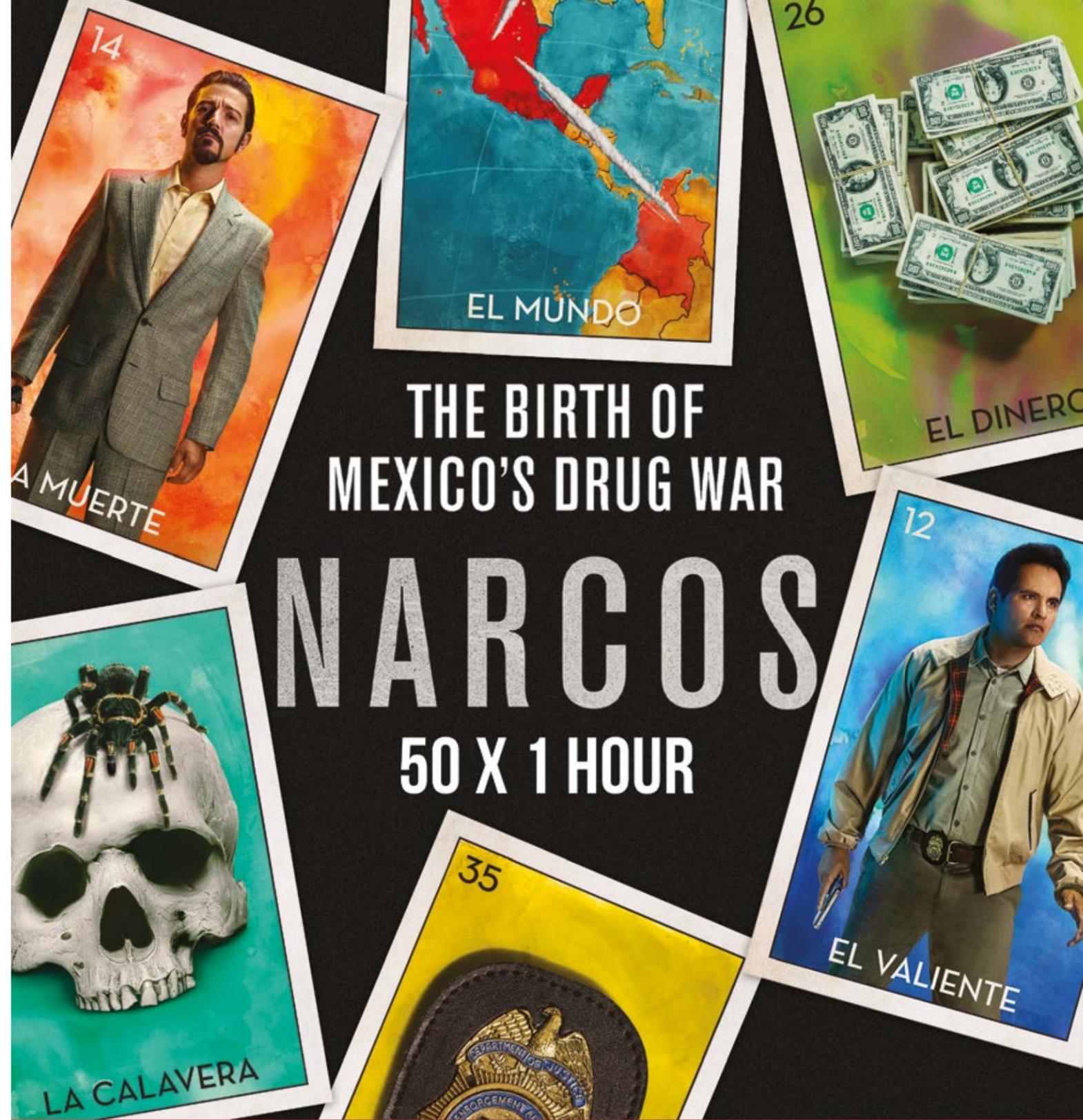
There is an increasing mixture of regions at Asian' tradeshows. For example, last year's ATF has received more visitors from Western countries looking to seal strategic partnerships in Asia. Independent producers from USA or Ukraine, just to mention two examples, believe there is a potential to co-develop, co-finance and co-produce with Asia. 'We are here because there are stories that need to be told. We've found many interesting and we hope to be able to produce in the region in the near future', one of the US producer explain.

It is notorious a bigger number of producers and distributors from APAC. Thailand is a good example: **JKN Global** has launched in Singapore 70 dramas of 25-30 episodes' x one hour each. 'We are investing strongly with the objective to have these productions in the regional and global market soon. We'll attend new shows the next year', highlighted **Anne Jakrajutatip**, CEO of JKN. India is another big case. Apart from an increasing number of distributors, Indian series are succeeding in different markets: CIS, CEE, Latin America, Africa.

THE HIGHEST AND THE LOWEST INTERNET PENETRATION RANKINGS, BY COUNTRIES (JANUARY 2018)

#	HIGHEST PENETRATION	%	USERS	#	LOWEST PENETRATION	%	USERS
01	QATAR	99%	2,640,360	213	NORTH KOREA	0.06%	16,000
02	UNITED ARAB EMIRATES	99%	9,376,171	212	ERITREA	1%	71,000
03	KUWAIT	98%	4,100,000	211	NIGER	4%	946,440
04	BERMUDA	98%	60,125	210	WESTERN SAHARA	5%	28,000
05	BAHRAIN	98%	1,499,193	209	CHAD	5%	756,329
06	ICELAND	98%	329,675	208	CENTRAL AFRICAN REPUBLIC	5%	246,432
07	NORWAY	98%	5,222,786	207	BURUNDI	6%	617,116
08	ANDORRA	98%	76,366	206	DEM REP. OF THE CONGO	6%	5,133,940
09	LUXEMBOURG	98%	572,216	205	GUINEA-BISSAU	6%	120,000
10	DENMARK	97%	5,571,636	204	MADAGASCAR	7%	1,900,000

Source: InternetWorldStats, ITU, Eurostats, CIA, etc.



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The French industry is under pressure

France is this year MIPTV Country of Honour, and organizers will promote a series of conferences and events dedicated to one of the leading European TV industries. For that reason Prensario is dedicating this space to know more about the local and international business, in a report written by Mathieu Bejot, Founder & CEO, Connoisseur Media.

French viewers spent 3.5 hours a day on average in front of their TV set in 2018, almost as much as in 2008. Similarly, television peak audiences on prime time average 24 million, almost unchanged since 10 years ago.

All quiet on the French front? Hardly so. Younger audiences are abandoning television in droves. Nearly two thirds of the 15-34 yo are SVOD users, and only 14% of them TV users. Among 50+ years old, the ratios are the exact opposite, leaving broadcasters with an increasingly greying audience.

Although France lags behind for SVOD adoption (less than half internet users subscribe to at least one service, the lowest rate in Europe, according to Ampere Analysis) it is growing fast. In February, Netflix hit the 5m subscribers mark, surpassing Canal+. With 4.6m daily users, SVOD is now being seen as the “5th channel”. Can France adapt while preserving what it likes to see as the best ecosystem in the world?

Part of the answer comes from regulation,

which is quite a challenge given the history of the last 30 years. The fear of allowing dominant players to emerge and of upsetting other media or related sectors have kept the French broadcasting market and its key players under-developed by international standards. Banning TV advertising on books, cinema or retailing, or preventing broadcasters from airing films certain days of the week, to name only a couple of oddities, have certainly not helped broadcasters compete with digital companies which don't play by the same rules.

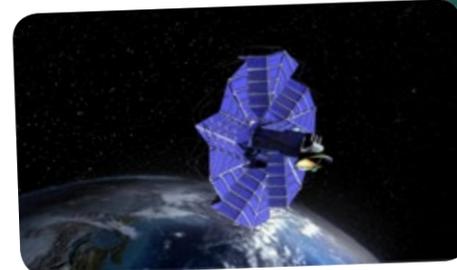
A much delayed broadcasting bill is expected to be unveiled this summer to come into force in the second half of 2020. Along with the transposition of the revised European Audio-Visual Media Services Directive, it is expected to modernize advertising rules and introduce more flexibility while securing financial contribution to French production. Netflix contribution for instance, a 2% tax on its French revenues which it started paying

in January only, is far less than that of its broadcasting competitors.

No concrete measures have been announced yet, and a consensus will be hard to reach, but the survival of a system that failed to really boost the sector while growth was still in order is at stake, in the face of the current disruption.

Despite producing edgier and more diversified series now, France has not really benefited from the “Golden Age of TV Drama”. While world production increased almost threefold in the last 15 years, France consistently produced over 700+ hours (less than half British or German volumes) in the same period. Two new daily soaps, hardly a novelty in the world of TV drama, and series commissioned by new entrants (now defunct **Studio+**, **Netflix**, **Amazon**) have only recently helped increase the total volume of national drama. Similarly, the format boom in the world only seemed to translate into more imports.

If at all, **Canal+** is very conscious of the urgency for a major shift in regulation. Between 2006 and 2017, French competition regulator, **Autorité de la Concurrence**, imposed very strict non-exclusivity clauses as a condition for approval of its merger with pay TV service TPS. As a result, its **Canal Play** platform kept bleeding customers and finally had to fold last year. Thanks to looser rules, the pay TV channel was able to launch its new **Canal+ Series** OTT service on March 12. For 6.99 to 11.99€ (for one to four users), viewers will be able to access 150 series, 90% of which are exclusive. **Canal+** own “Creation Originale”, with shows like *Hippocrate*, *Spiral*, *Versailles* or *The Bureau*, will be released day & date along with shows from partners such as Showtime or Fox. After launching a cheaper version of its service to a younger audience available only on PC, tablets and smartphones, and its Canal App,



TV France International has revealed the nominees for the 15th Export Awards: *Call my Agent!*, from Mon Voisin Productions & Mother for France Télévisions; the animated series *Grizzly*, from Studio Hari for France Télévisions and Turner; and the documentary *Origami Space*, from La Compagnie des Taxi-Brousse for France 5, 3SAT, ERR, LRT, Ceska Televize, NC+, CHELLO TV and RTS

Canal+ Series is another step away from traditional television.

Other broadcasters have also been steering away from relying on their main historical channel to garner advertising revenues which have stagnated at best. They have diversified their portfolio to include DTT channels and digital ventures in particular, in order to maximize the use of their content and to offer announcers versatile advertising solutions to reach increasingly fragmented targets. In January, TF1 thus launched Unify to bring all its digital activities together, from female-interest websites to health portals through to digital **Studio 71**, giving it an unprecedented international exposure at the same time. With a view to developing synergies, **M6** is now acquiring kids channel **Gulli** and a raft of specialty channels from **Lagardère**, after buying leading French radio station **RTL** from their common parent company **RTL Group**.

TF1 and **M6** have also joined forces with France Télévisions to launch a new SVOD platform **Salto**. Few details have surfaced about the project that still needs to be greenlit by **Autorité de la Concurrence**.

The French Government has also forced a digital shift at public broadcaster **France Télévisions**. Two channels, **France O**, which focuses on overseas territories and youth-skewing **France 4**, will be axed in 2020 and replaced before then by a non-linear format. This has caused an uproar among animation producers in France and Europe,

France being the powerhouse of animation production on the continent in large part thanks to the guaranteed annual investment from the public broadcaster. So far, the group has pledged to maintain its level of investment. The digital shift has also pushed France Television to reorganize its program units on the model of the kids department. Drama and docs are now commissioned at the group level, and not channel by channel, allowing for more flexibility and coherence.

In order to develop its OTT presence, **France Télévisions** has lately signed a deal with the producers' associations to secure more SVOD and non-linear rights, in exchange for shorter rights, and guaranteed investments in independent production.

Not surprisingly, consolidation and digital are also top priorities for producers who are gearing up for a shift of power towards the broadcasters. The priority given to independent producers since the mid 80's has been under strong attack from broadcasters who now need to control more rights than they were ever allowed in order to develop strong digital offering. In early March, independent producer **Elephant**, behind the success of family comedy *Desperate Parents*, sold a 51% stake to **Webedia**, the largest online media group in France which boasts 250 million unique monthly visitors worldwide. For **Elephant**, the move will allow it to work on new formats, especially

with **YouTube** stars, and look at new business models. Other examples of consolidation abound, with an increased appetite for the international market, as exemplified by the rapid growth of **Federation**, or **Mediawan**. The former has been diversifying into kids programs, docs and non-scripted through various alliances, while striking international partnerships. The latter has been investing in **AB's** TV channels, production companies in France and outside.

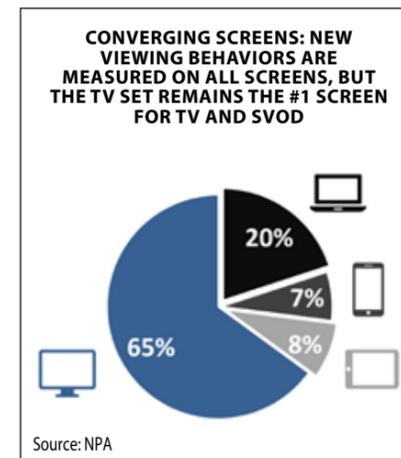
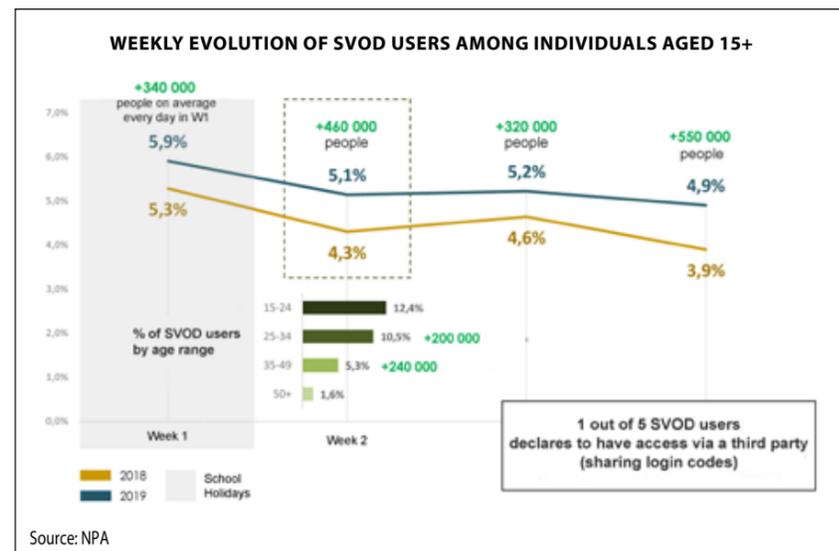
Thanks to a carefully crafted system, and despite its constraints, the French TV industry has shown a high level of creativity that is showcased at mipTV. To maintain and increase that level, new rules have to be laid out soon in order to help all the stakeholders adapt to a fast-changing environment.

French exportations, up

TV France International reported last September the impressive figures for French TV programming in foreign markets for 2017, with total revenue of €325 million, the second-best performance in the past 20 years. French exports go well beyond Europe with a notable increase in USA/Canada, up 16% last year.

While overall international sales have doubled over the past eight years, French animation confirmed its leading position: the genre accounted for 37% of total export revenue, while documentary recorded its second-best performance in 10 years, and drama series has known a record year with a 28% increase over 2016 with successful cases as *The Bureau* or *Midnight sun*, and long running *Candice Renoir*, sci-fi *Missions* and political fare *Baron Noir*.

‘French companies are thriving in the full spectrum of program sectors achieving strong ratings wherever their shows are broadcast’, said **Hervé Michel**, President, **TV France International**. ‘We are proud to be “Country of Honour”, we welcome all the initiatives that raise the profile of our TV industry and support sales of French programs throughout the world along with distributors’ syndicate **SEDPA**, producers’ syndicate **USPA**, **SPFA**, **SPECT** and **SATEV**’.





Channel 4: 'We're set out to innovate and take big risks'



Alex Mahon, CEO, Channel 4, at INTV 2019



Studio Lambert's *The Circle* take reality one step to the future: Netflix has bought the formats to adapt it in three territories, including USA

Alex Mahon, CEO of Channel 4, the third TV group in the UK participated at the last edition of INTV and offered the top trends and shared her points of view about the business. Here we reproduce the main concepts.

One of the most interesting and prevalent genres in Channel 4 are the current affairs and documentary programming. Mahon explains: 'We have always had a track record in documentaries and investigative journalism, it's always been part of the brand and the channel, which was set up to appeal to diverse audience that others didn't or couldn't reach'.

And she exemplifies: 'In the past weeks we've programming about women's relationships with their bodies; then we had three identical strangers: we released cinematically about triplets separated at birth; and then the Michael Jackson piece we released as 2 2-hour documentaries'.

About 2 million viewers tuned into controversial *Leaving Neverland* at the beginning of March in Britain. Produced with HBO, part 1 peaked at 2.4 million viewers and averaged 2.1 million, while second part was down slightly with a peak of 2.2 million and 1.9 million average.



which equates to a 12% share of the British audience. Those figures are more than double the usual audience for Channel 4's 9pm slot and eclipsed the viewership numbers on HBO US.

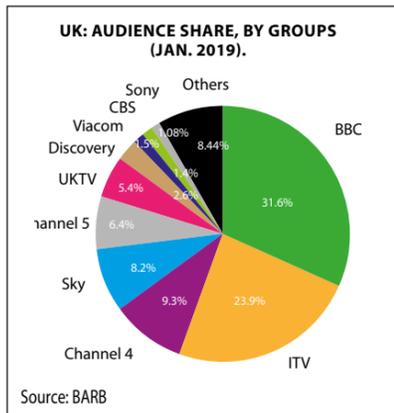
'It's not an easy watch, and it rated off the charts: 400% on slot average, 35% share for young's, on a normal night that's 6-8%, it's on track to become most streamed and downloaded show. We have watched documentary on Netflix but not on linear so much', adds Mahon.

She continues: 'We are set out to innovate and take big risks. Sometimes we believe the young audience isn't interested in facts, but if you look at the evidence, they are interested in the facts; they disbelieve 80% of what they see online, they are the savviest about what they see. When we have that, we get a hit. They also watch news, but in different ways. The challenge for us is to go to where the audience is: the youngsters are already trained to watch where they want and how they want, we can't bring them back'.

Apart from Channel 4, the TV Group operates E4, More4, Film4, 4Seven, 4Music and the HD+1 Channels. 'The simple purpose of this is to optimize audiences and ad revenues. We've aligned the channels more, brought all the logos back to one master brand, you need the audiences to know what you stand for. We have to see how we maximize total minutes spent with Channel 4 across all the channels rather than seeing them as different businesses, each appeals to separate demographics', Mahon clarifies.

About digital strategy, she adds: 'We finance our catchup service through ads, we have enough growth to fund that, but we have to grow that even more. Even we are technically a state-owned asset —but not a state broadcaster— we don't take any government money. The preserve of being editorially independent and politically independent is fundamental in the UK'.

One of the biggest swings Channel 4 took this year was a show called *The Circle* taking reality one step to the future. What's her perspective? Mahon answers: 'It's incredibly tough to launch a new reality show, a new rigged reality show hasn't happened in



the past decade. At a time when audiences want fresh things, but they also have choice overload. We set it up with Stephen Lambert. In this year, the premise is that the individuals are separated from each other and they interact through social network, it's a commentary on how you can be catfished and more about how your digital life and real life can be separate. The people loved it, but it was a very young skewing show, we'll bring it back in a few months and see'.

The channel also programs *Bakeoff*. 'We have a spread of things, like documentaries, realities, the best things are the ones that hit the commercial and public service bullseye. *The Circle*, which has been picked up by Netflix, does that because it will become more commercial in the second season, and it becomes more socially commenting'.

The comedy *The End of the Fucking world* brings to the surface so many issues, and it was also picked up by Netflix, while *Catch 22* is a new miniseries co-produced with Hulu, Paramount and Sky Italy. 'The price of scripted has gone through the roof, and so you have to be a partner, we're either doing stuff that's early stage and innovative, then you need partners to fund it', concludes Mahon.



George Clooney's *Catch 22* is a new miniseries co-produced with Hulu, Paramount and Sky Italy to be premiered in the OTT in the US and Channel 4 (UK) along with a large number of broadcasters confirmed



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AWESOMENESS



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Mediaset Italy: enhancing adrenaline

Mediaset Italy is one of the biggest in Europe, betting on a strong generalistic FTA traction, speaking to a huge audience with a wide and varied offer both on the scripted and the unscripted side.

According to Auditel, total listening to Mediaset networks has grown both in prime time and in 24 hours during 2018, reaching 34.7% with an increase of 0.9 points in prime time vs. 2017. The 24-hour Mediaset also performed well with a share of 33.4% and a growth of 0.2 points. But the ratings also increase by concentrating the observation only on the three generalist networks. Despite the multiplication of TV offers, the major Mediaset networks have grown on the commercial target of 15-64 years composed of the public most exposed to new technologies. Canale5 in particular is not only the Italian television channel most seen on the commercial target (17.2% in prime time and 16.1% in the 24 hours) but it is also the Italian flagship network with the best growth in the active public both in first evening (+0.7 points and 17.2% share) both in the 24 hours (+0.2

points and 16.1% share).

As for the Mediaset generalists, even **Italia 1** grew by 0.4 points in the early evening in 2018 vs. 2017, achieving a 7.3% share of the commercial target, according to Auditel, while the new **Rete4**, which started in September alone, has already given the first results: from 9 September to January, prime-time listening has already increased by 10.3% on the total audience, bringing the prime time share to 4.3%.

Fabrizio Battocchio, head of formats and factual, explains that one of the keys is still to focus mainly on documentaries, either feature and non-feature, scheduling Films only once a week, but 'enhancing adrenaline fuelled titles, rather than institutional ones'. 'We've abandoned Current content while we are testing Disaster/ Catastrophes and evaluating Big Adventures of men pushing their limits'.

According Battocchio, Natural History, Wildlife, Crime and History are genres in constant growth, as well as the 'recent appetite' for Engineering and Mega Moves titles who seem to be filling all distributor's catalogues. 'This year 2 big anniversaries lead the trends: Moon and Space content for the 50th anniversary of Moon Landing as well as Science and History to commemorate **Leonardo Da Vinci's** 500th'. 'Science has proven to be appreciated best if 'light or pop' or when portraying great scientific achievements', he adds.

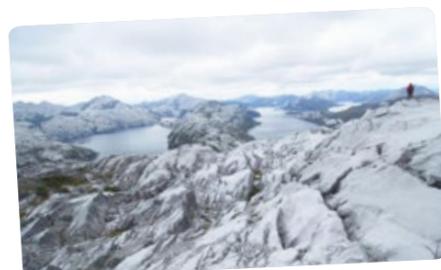
But he remarks: 'Focus is not the only channel broadcasting documentaries. For Rete4, for instance, we search for Modern History titles for the late night slots as well as wildlife for daytime, Landmarks and Blue chip Natural History for the Prime Time.

Our leading channel, Canale5, is testing Feature Art Docs in late night as well as Live concerts or high quality Biopics of mainstream singers. Wildlife is also part of the schedule, during Sunday's daytime'.

'Entertainment has proved to be sometimes less effective than fiction, but definitely more efficient. FAANG companies had to try, especially nowadays, when the audiences seem to be more and more interested in "real" storytelling provided by factual entertainment.



Fabrizio Battocchio, head of Formats and Factual at Mediaset



Terranoa's Ultima Patagonia



Marte: Missione Insight

Personally, I think that despite the growth of this genre, linear TV can still single itself out/ stand out with big studio shows and live events', remarks **Battocchio**.

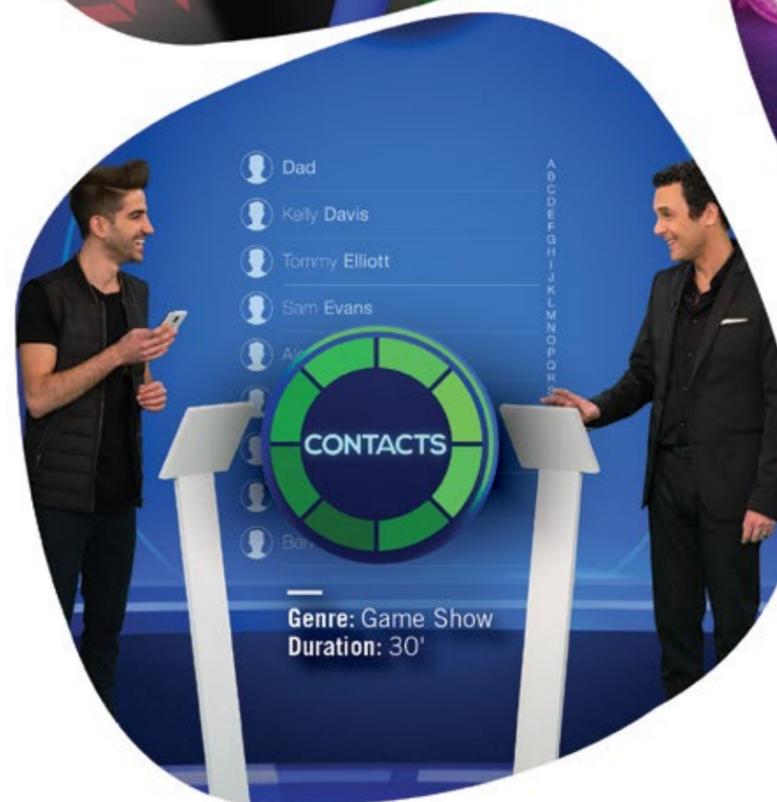
'Among the main titles that we launched are *Desperate Hours*, from **KM/Big Media**, as well as **Terranoa's Ultima Patagonia**, but it we also produced in-house some events that performed pretty well. In-house production and original commissioning are among our goals for the future', says Fabrizio and highlights *Marte: Missione Insight*, *Universo misterioso: le ultime scoperte*, *Vajont*, *Analisi di un disastro* and *Focus Natura* as some of the best performing shows.



Genre: Game Show
Duration: 9x30'



Genre: Game Show
Duration: 15x30'



Genre: Game Show
Duration: 30'

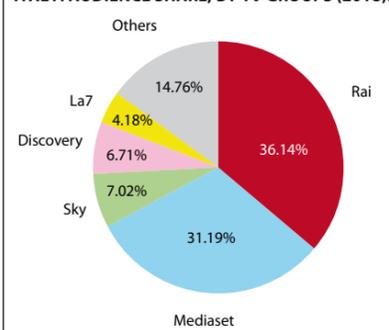


Genre: Game show
Duration: 30'/60'



Universo misterioso: le ultime scoperte, original production

ITALY: AUDIENCE SHARE, BY TV GROUPS (2018).



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TVI: new formats, winner and innovative stories

2018 has not only been another leading year for **Televisao Independente (TVI)**, the top broadcaster of Portugal of the last 14 years. Last year, it has won its second Emmy International —the third for the country— for *Payback (Ouro Verde)* while it continues to lead the local market with its dramas, as well as promoting them internationally.

Bruno Santos, general manager of programming: ‘Receiving our second

award for “Best Telenovela” by the end of the year was a gift of recognition of our work. The 2019 strategy is to continue innovating with new formats and original stories on the drama side’.

‘The Emmy is a moment of celebration for all the people involved in the production and the recognition of an international jury about the work developed by **TVI** in Portugal. This happens eight years after we received the first Emmy with *My Love*, the first Emmy given to a Portuguese novela’.

‘For **TVI** and the Portuguese industry means that our drama continues to be a reference for the international market and even without huge budgets, we continue to deliver in this genre the best storytelling and quality of production. The Emmy also contributed for the international awareness in the international market of *Payback*, the telenovela was sold already in 30 countries (including USA, Spain, Poland and the MENA region, just to name a few) and we are hoping to close other territories during MIPTV’, he reinforces.

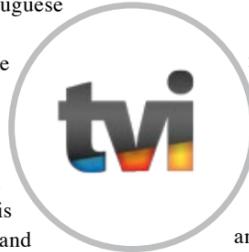
The last TV season was a success for **TVI**. On the entertainment side, Portuguese adaptations of formats like *Raid The Cage*, *Masterchef* or *Kitchen Nightmare* were very successful together with its drama slate. ‘In the beginning of 2019 we have already released new seasons of *Dancing with The Stars*, *First Dates* and *Raid the Cage* and two new formats in Portugal: *Who Wants to Marry My Son* and *Stripped*.’

‘We also have the debut of *Pantene Hair - The Dream*, a format that had a great success in Brazil and that will be a success in Portugal besides being innovative as a project of Branded Content. Still in this first semester, we are going to launch a new drama, which is now in pre-production called *The Prisoner*’, he adds.

Regarding the Portuguese



Bruno Santos, general manager of programming, TVI



market, Santos comments: ‘At **TVI**, we believe in the strength of a balanced mix between news, entertainment and drama. We have drama in prime time from Monday to Friday and entertainment on the weekend nights. We believe in partnerships and in co-development of formats with producers. It is a way of experiment new genres and it can be a new business for the company’.

‘We have already produce a daily strip of reality show, *Love on Top*, a **TVI** co-development with **Endemol** and most recently, in early December **TVI** launched *50 Horas*, a unscripted physical game show pilot developed with **Fremantle**. The same with the drama side where our sister company **Plural** is working already in some projects involving other countries and co-productions’, concludes **Santos**.



Payback Emmy International winner of 2018, second recognition for TVI, third for Portugal drama: José Eduardo Moniz and Helena Forjaz (TVI) with the author of the novela Maria Joao Costa, director Hugo Sousa and leading actress Joana de Verona

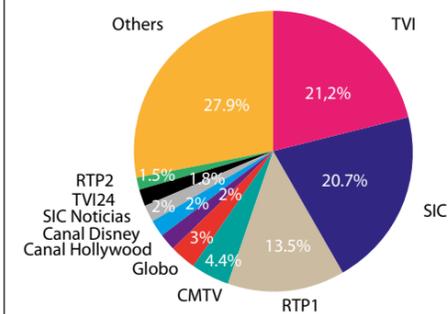


Apanha Se Puderés, on its second season



Quem Quer Casar Com O Meu Filho, new format

PORTUGAL: AUDIENCE SHARE IN TOP 10 TV NETWORKS (JANUARY 2019).



Source: Markttest



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CME: 'The digital revolution is making TV stronger'



Christoph Mainusch, Co-CEO of CME and GD of TV Nova

Central European Media Enterprises (CME) is a media & entertainment company operating businesses in five CEE markets: Bulgaria, Czech Republic, Romania, Slovakia and Slovenia. CME was founded in 1994 with the launch of TV Nova in the Czech Republic.

The Group's operations include 30 TV channels broadcasting to approximately 45 million, and streaming platforms (SVOD, AVOD). And its TV brands are market and audience share leaders in all of its countries of operation with a combined 2018 TV advertising spend of approximately USD 941 million.

'We have achieved strong double-digit growth in profits in 2018, for the fifth consecutive year. We also completed the sale of our operations in Croatia about six months ago and have recently decided to keep our Slovenian operations', comments to PRENSARIO Christoph Mainusch, Co-CEO of CME and GD of TV Nova.

Consulted about the key pillars of the

Group, the executive answers: 'Production of premium and original local content, and being the most relevant and trustworthy source of news. These are not only key in attracting large audiences in TV, but also to our other non-linear platforms'.

The nowadays-audiovisual industry is not the same as when CME was founded. On of the most dramatic changes is not technology, but the strong development on own IPs and local production in CEE. 'The region is seeing more and more investment into own-produced content, on a scale outstripping the growth of the TV ad market. This is in line with the global trend for localizing content as the single most effective tool in keeping relevance in an ever more fragmented market, faced with global OTT giants making inroads into midsize and smaller markets too', remarks Mainusch.

And he continues: 'Local television and film industries are benefiting from this development, as the demand for local content is growing to unprecedented levels. Unique local content is finding its place on our local digital platforms, enabling our TV content to reach audiences many thought would never watch TV again'.

As a result of this process, the time spent viewing TV has been rising, according to the executive data: 'The digital revolution is making TV stronger in markets where local big budget original digital exclusives are rare', he underlines.

About CME, its programming strategy is 'completely localized', states Mainusch Mainusch, and he completes: 'We're adapting to market demands and audience tastes in every territory we operate in. Generally speaking, all over the CEE region we've seen the audience demand for locally



Second Chances is a successful Czech crime series on Nova TV, adapted from Belgian series Professor T



relevant content produced in high quality growing stronger by the year. Because we're trying to stay ahead of the curve and offer more and more of precisely such content, our TV channels are by far the first choice for news and entertainment in every one of our territories'.

'The industry is strong in the CEE region, reflecting a steady economic growth in countries we operate in. CME is undergoing a phase of strong business results and growing profits. Our operations are more focused, making a point to keep costs under control while investing more in local content. Our future outlook is positive', he completes.

Mainusch is also the general director of the Group's first TV channel to be launched in CEE: TV Nova in the Czech Republic. He explains: 'The best ways to keep our edge in an ever changing, highly competitive market is to be the go-to source of news in the country, strengthen our local blockbuster brands, excel in production execution, and innovate for good measure. Being relevant today means being local on a world-class level'.

'The viewers have recognized our strategy of offering a mix of trustworthy news, the best local content and biggest international hits. While our competitors lean heavily into this or that genre, we're trying to stay broad in our appeal and diversify', he adds.

'We're seeing a boom in the production of local scripted content. The offer of local

TV AD MARKET SIZE, BY GEOGRAPHY IN CME'S FIVE OPERATING MARKETS (2018)



Source: CME estimates at average 2018 exchange rates

WORLD-CLASS DRAMAS AND STARS



THE GENERAL'S DAUGHTER

Can a mission be accomplished if you don't know what you're fighting for?

Starring 37th International Emmys Best Actress Nominee, Angel Locsin

Genre Drama | Action TRT 40 eps (approx.) x 45 minutes

LOS BASTARDOS

Brothers by blood, enemies by desire.

Screens are set to sizzle as five desirable men join together to bring life to the Philippines' hottest and sexiest novel.



Genre Sexy Drama TRT 40 eps (approx.) x 45 minutes



BETRAYAL

When the choice is between your marriage to a woman who has hurt you and the love of your life, is there really a right choice?

Starring Asia's King of Drama, Jericho Rosales

Genre Drama TRT 40 eps (approx.) x 45 minutes

CME: 'The digital revolution is making TV stronger'

dramas, crime series, soaps and comedies is growing at astounding rates. Czech viewers are very loyal to characters they've grown to love, so we're seeing our programming strategy relying on key scripted programs making a return year after year'.

'We're investing in local scripted programs, original and adaptations of successful foreign formats alike, as well as in entertainment. This year is going to see new episodes of our original crime dramas, *Police Modrava* and *Second Chances*, an adaptation of *Professor T*, as well as our original true crime series, *Traces*, a new

original local comedy, and new seasons of adaptations of international reality and entertainment formats, such as *Your Face Sounds Familiar* and *Wife Swap*.

Mainusch concludes: 'Free TV is by far the most watched medium in the Czech Republic and has the highest reach. We use this fact as the basis for creating a feedback loop between content launched on linear TV and content extended into digital. The content offering on our AVOD and SVOD platforms is built on news, local scripted content and entertainment, the very genres that make the foundation of our success in linear TV. Our

strategy is shaped by the fact that we're, first and foremost, content providers. The platform we use to offer our content on is of secondary importance. Content is king'.



Your Face Sounds Familiar is having a new season on TV Nova

bTV Group: 'TV is highly effective and powerful'



Florian Skala, CEO, bTV Media Group

bTV Media Group's CEO, **Florian Skala**, comments on the successful development of the company and the plans for 2019 in an interview for CEETV that PRENSARIO reproduces in this MIPTV edition.

'Our top priority has been to improve the financial results of the company. To this end, we put significant efforts into strengthening the audience

results, developing our multiplatform presence, and improving our sales performance. And we succeeded because we put a primary focus on high quality content. We also made huge steps in improving the synergies among all the Group channels, so that our content performs equally well on TV, online and radio', he explains.

'We expect the market in 2019 to grow, backed by the healthy macro-environment and its influence on demand. At the same time, we also acknowledge and will further exploit the additional potential of the market - the ad intensity is still very low compared to the developed markets (less than half) with TV being the most accessible medium in Bulgaria. TV is highly effective and powerful, delivering the highest ROI and undisputed results for growing profitable, sustainable brands'.

bTV launched a brand new studio for news and current affairs. Skala comments: 'It is an entirely integrated studio, implementing state-of-the-art solutions, so far unseen on the local market. It is inspired by similar projects of leading worldwide TV channels, and we are working with internationally acclaimed studio designers. Because of its scale and complexity, the project is undergoing several stages of preparation before our viewers can see it this spring'.

Regarding programming, the executive continues: 'We are building on the momentum from our successful seasons in the past two years. We have upgraded seasons of the spring rating leaders *The Voice of Bulgaria*, *MasterChef Bulgaria*, *Home Makeover*, *Wife Swap* and the Bulgarian series *Capital Hillbillies*'.

'We have a lot of exclusive online content already in shooting for the digital platforms of *The Voice of Bulgaria* and *MasterChef Bulgaria*. Our news team produces an online video series, *News from the Inside*, in which our hosts and reporters share insights about their job and how to distinguish professional qualitative journalism from fake news.

bTV has upgraded its AVOD and SVOD platforms, **bTV Plus** and **VOYO**.

About the competition with Netflix, he clarifies: 'There are conceptual differences between these platforms, which predispose different user habits in Bulgaria. Netflix wins subscribers with its rich library and especially its original productions worldwide, but is still not offered in the local language or with local content in Bulgaria. **VOYO** is preferred mostly by the numerous **bTV** viewers who are following their favorite content ahead of the TV broadcast, and at their convenience afterwards', concludes **Skala**.



The Voice of Bulgaria



MasterChef Bulgaria

INVESTIGATING
IN STYLE

MS FISHER'S
MODERN
MURDER MYSTERIES

crime-fighting never looked so good

Every Cloud Productions for Seven Network Australia, in association with all3media International, Screen Australia, Film Victoria and Fulvum Media France

AGATHA
RAISIN
SERIES 2

A QUIET VILLAGE LIFE
CAN BE MURDER

A Free@Last and Company Pictures Production for Aopn TV produced in association with all3media International

BY FABRICIO FERRARA



Europe: OTTs play their strongest battle



Sky Germany has invested on the reboot of the German anti-war classic *Das Boot* (1981), produced by Bavaria and distributed globally by Sonar Entertainment

The European OTT expansion was not as fast as it was imagined a couple of years ago. The deep development of the television business —especially the *pubcasters*— and an older audience were two of the reasons why OTTs started developing first markets such as Latin America, MENA and APAC. That's has radically changed and now the main players are holding a tough battle

Now that they are consolidated and expanding in those emerging territories, Europe has become the most recent battlefield for top global OTTs. In the continent, the two largest and most developed digital markets are UK and Germany while the Southern Europe market —including France— have been moving slower, but now some of them are taking the lead. Let's take a look.

Global context

The US remains the biggest single territory for SVOD with the three biggest global operators: **Netflix** reaching 150 million subscribers; **Amazon** with +40 million, and **Hulu** with +25 millions. While the US growth is slowing, Europe is catching up becoming the battleground for the future of streaming TV, and the battle lines between established broadcasters and the insurgent **FAANGs**, this is **Facebook**, **Amazon**, **Apple**, **Netflix** and **Google**.

The global market is reconfigured after **Comcast's** USD 40 billion deal to acquire European pay TV giant **Sky**, **Disney+** to be ready by the end of this year along with **WarnerMedia** new OTT services (see more information in a report inside this MIPTV edition). With **21st Century FOX's** acquisitions, **Disney** has also taken control of **Hulu's** (60% of shares) and it could be

its second OTT platforms of, now, the largest Major Hollywood Studio.

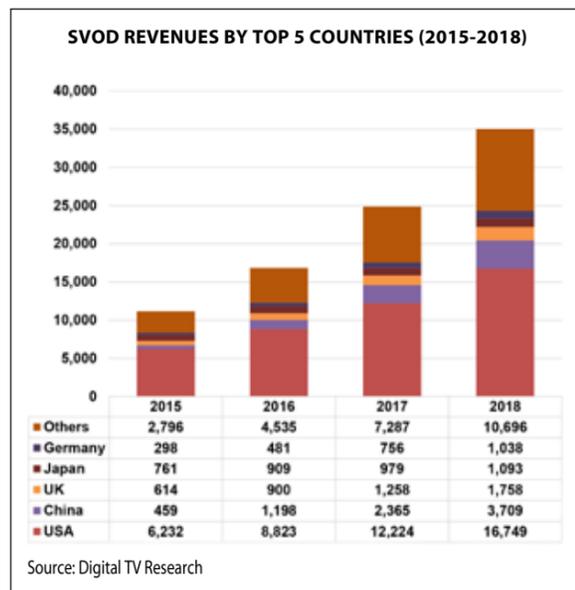
Europe

A report from last September by Research and Markets forecasts SVOD revenue in Western Europe will nearly triple from USD 4.4 billion in 2017 to about USD 12.5 billion in 2023, near the value of the SVOD market in the US today.

There is an unprecedented investment in localized European programming by **Netflix** and **Amazon**. While the first is well-established with local teams in the top territories, the second one has recently confirmed the establishment of **Amazon Studios**

UK office to increase its Originals' developments; **Sky** has been upping its investment in such original series as a reboot of the German anti-war classic *Das Boot*, set just after the events of Wolfgang Petersen's 1981 submarine epic.

Local broadcasters, public and privates, are joining together to face this strong competition. Germany's **ProSiebenSat.1** has linked up with **Discovery Communications' Eurosport** network on a joint SVOD platform, and **France Télévisions, M6** and **TF1** have launched **Salto**, a French-language streamer.



The **BBC**, **ITV** and **Channel 4** are pledging USD 165 million to make their digital TV platform **Freeview** a full on-demand service, and **ITV** has said it is exploring plans for its own stand-alone SVOD operation, though its hasn't yet set aside cash to do so. Recently, **BBC** and **ITV** publicized **BritBox**, a new streaming service delivering the best British content to the audience. While the companies have anticipated that other partners will be added and both are speaking to regulators and the wider industry about their proposals, they confirmed the aim to launch the service in the second half of 2019.

Spanish pubcaster **RTVE** and commercials groups **Mediaset España** and **Atresmedia** have confirmed that they have teamed up to launch a new joint interactive platform based on HbbTV, with plans for a new OTT TV service to follow. Branded **LOVESTV**, it will be open to other DTT broadcasters in the country, and promises to 'improve the experience of consuming TV, allowing interactivity, thanks



"The Alliance" has been forged by France Televisions, Rai and ZDF, which also announced three joint projects: ZDF head of drama, Simone Emmelius, Eleonora Andreatta, head of drama, Rai (Italy) and Takis Candilis, France Televisions' managing director and head of programming (Credit: Anna Camerlingo)

to HbbTV technology'. The service will group the audiovisual content of all three with the objective of improving the diversity and quality of the FTA offering and the user experience for those accessing HbbTV services in the country.

Other Europe's leading public broadcasters have joined forces in a scripted content co-production pact that aims to counter the growing force of US streaming services, was announced in mid-2018. "The Alliance" has been forged by **France Televisions**, **Rai** and **ZDF**, which also announced three joint projects: *Leonardo*, a series by **Lux Vide** and **Beta Film** for **RAI**, **ZDF** and **France Televisions**; *Mirage*, an espionage series set in Dubai co-produced by **Lincoln TV**, **Cineflix**, and **Wild Bunch** for **France Televisions** and **ZDF**; and *Eternal City*, set in Rome's La Dolce Vita period involving the murder of a French starlet in an apartment on the Via Veneto, and

produced by **Aurora TV**, **Fearless Mind** and **Banijay Studios France** for **RAI** and **France Televisions**.

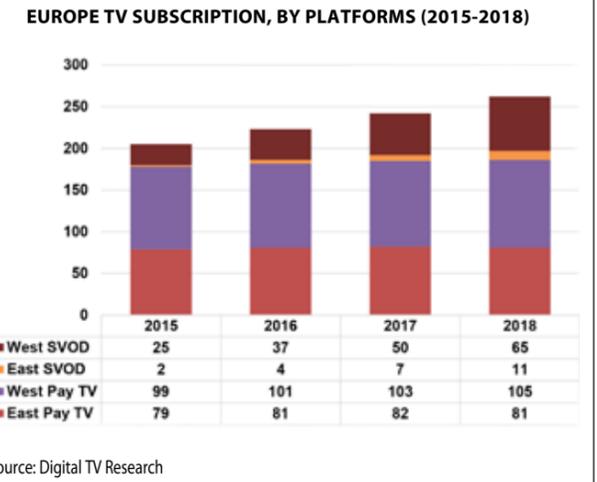
This group is open to the potential participation of other European *pubcasters* such as **RTVE**, **RTBF**, and **RTS**. Its main goal is to co-finance innovative, higher-profile, and generally 'bigger TV series for viewers in Europe and all around the world', they said in a joint statement. **FTV** CEO **Delphine Ernotte**

Cunci, she said that European *pubcasters* invest an annual total of €14 billion (USD 16.7 billion) in original programming while **Netflix** invests 'only €7 billion'.

Set up against the **FAANGs'** financial might, Europe's regional broadcasters might seem puny, but **Simon Murray**, principal analyst at UK-based **Digital TV Research**, says Europe's local giants can still compete if they focus on their key strength: local programming: "These channels know their market and audiences better than anyone. If they can find the right programming and business model that mixes advertising with subscription and doesn't go head-to-head with **Netflix**, they will do well. In Europe there is a lot of space for everyone", he stands.

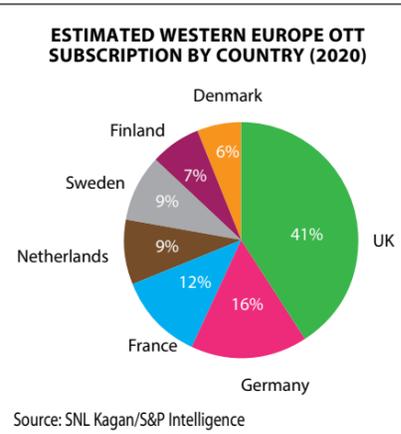
Kagan euro streaming 6 M a r 2 0 1 9 K a g a n calculated last March that currently, of the USD 6 billion in consumer spending on subscription online video services, five services account for 89% of the total. Moreover, in terms of active paid subscriptions, these top five services represented about 84% of the total market at the end of 2018.

The studio analyzed that over the past few



years, online video services in Europe have experienced rapid growth, particularly those that follow the subscription revenue model. 'Global players such as **Netflix**, **Amazon** and **HBO** went direct-to-consumer, disrupting the previous long-term relationship', concluded.

Lastly, **FAANGs** have been required to compensate publishers and creators for the content that appears on their websites, under new European Union copyright rules that could shrink access to online media in Europe. The new rules mean music producers and publishers could come gunning for more money from **Alphabet Inc.'s Google** and **Facebook Inc.** to compensate for the display of their songs, video and news articles.



Georgia Brown, Head of European Originals, Amazon Studios confirmed at INTV Jerusalem 2019 that it is launching the first UK unscripted original: *James May in Japan*, a six-part travelogue where the star of *Grand Tour* goes under the skin of Japan (credit: Amazon)

Madrid's Ciudad de la Tele is the place chosen by Netflix to launch a 22,000sq2 production hub in Ciudad de la Tele, Madrid, built by and managed by Grupo Secuoya

Europe: OTTs play their strongest battle

The rules 'enables creators to be remunerated fairly by large online platforms that today are siphoning the value of the creative sector while failing to compensate creators', explained **Veronique Desbrosses**, DG of **GESAC**, a European umbrella association of authors and composers.

UK

In the last years there has been a growing consumer demand in the UK for streaming services, with more than 12 million households having at least one SVOD service. According to **Broadcasters Audience Research Board (BARB)** data, more households are taking multiple subscriptions while the annual growth in homes with any SVOD service is 20%, the growth in homes with multiple services is 32% with four million homes now having more than one subscription.

A research commissioned by **ITV** shows that desire for British content is high with 43% of all online homes interested in subscribing to a new SVOD service which features British content. This increases to over 50% in homes with a **Netflix** subscription. This would be in addition to their current subscriptions.

'The number of UK homes now accessing at least one of **Netflix**, **Amazon** or **Sky's Now TV** has grown by 5.7% on Q3 2018 to reach 12.3 million, with 660,000 additional homes taking at least one SVOD service compared to the previous quarter. The number of homes with two or more services also increased to 4.3 million', describes **BARB** reporte.

Netflix and Amazon made gains of 6.2% and 7.6% respectively compared to Q3, while **Now TV** dropped 3%. Whilst every Q4 has shown growth, Q4 2018 was the lowest since 2014. Quarter-on-quarter growth for Q4 was 7.6% in 2017, 8.7% in 2016, 6.6% in 2015 and 3.7% in 2014. 43% of homes now have access to one of these SVOD services in the UK.

Germany and France

Germany has the largest and best-funded public broadcasting system in the world, making it a very tough market to break into. Free TV is still the dominant business model. Among Western European countries, Germany and France have been slow to adopt SVODs, including **Netflix** and **Amazon Prime Video**, but that's appears to be changing.

By the end of 2017, 18% of all German households were subscribing to at least one paid VOD service, according to new data from **Goldmedia.com**. The market appears to be on a growth trajectory. Total revenue at the end of 2017 amounted to €1.1 billion and are anticipated to more than double within only five years, climbing to €2.5 billion by 2023.

Amazon Prime Video and **Netflix** continue to lead the pack in the German VOD market. Other players are British satellite TV operator **Sky**, **Maxdome**, **Apple iTunes** and **Google Play**. Specialist sports streaming services such as **DAZN** and **Eurosport** are also seeing an increase in users. **Goldmedia** said SVOD services account for the highest share of turnover in the German VOD market with a market share around share of 74%, growing to 80% share by 2023.

Similar to the US, the two leading platforms are focusing heavily on producing original content in Germany. **Goldmedia** said licensed titles streamed via transactional VOD and electronic sell through are also popular among users, notably theatrical movies available to view on-demand just months after they have been released in cinemas.

Spain

Since 2-3 years ago, things are changing deeply: OTTs are racing a strong competition. First, a big number of players have been launched,

after **Netflix** disembark in October 2015: **Amazon**, **HBO** (2016), **AMC** and **Sky** (2017), added to local service **Telefonicas's Movistar+** and **Rakuten's Wuaki.tv**.

Second, the world's leading Internet entertainment service, **Netflix**, is inaugurating



Lionsgate has acquired the US remake rights to *Veni Vidi Vici*, the 10-part Swedish comedy series created for Nordic Entertainment Group's Viaplay streaming service and has been picked up in key territories, including in the US by Hulu and in Australia by SBS

sooner or later its 22,000sq2 production hub in Ciudad de la Tele, Madrid, built by and managed by **Grupo Secuoya**. It will be a central facility for **Netflix's** growing slate of Spanish-language original content over the coming years including new and existing titles produced by **Netflix**, as well as series and films made by production partners for the platform.

According to **Nielsen Sports**, OTTs gain subscribers quickly in Spain: 64% of Spaniards between 16 and 69 years old use a service of this type according to the report "Sport and OTT in Spain" of the consultant last January. As in many global markets, **Netflix** leads the table followed by **Movistar**, **Amazon Prime Video**, **HBO**, **Vodafone** and **Orange**.

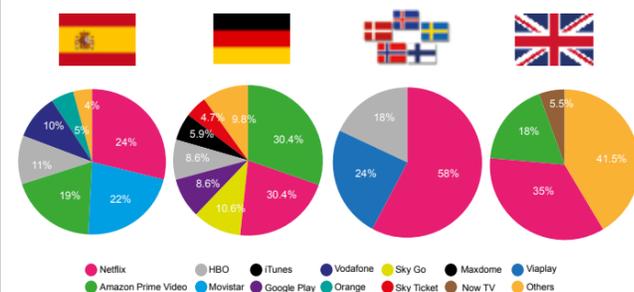
In terms of sharing accounts, the study describes it as a 'common practice' in the country: 70% of **Netflix** clients do so with their relatives (56%) and friends (13%); it is 58% in the case of **HBO**, 56% in the case of **Orange**, 53% in the case of **Vodafone**, and 50% in the case of **Movistar**. The penetration of OTT services among young people reaches 71%. Men represent 65% of the entire OTT audience, and the most popular content is live football.

Italy

SVOD is increasing in Italy, too: the number of subscriptions is getting closer (exceeding it in the forecasts) to that of Pay TV, according to an **Ernst & Young** study, commissioned by **Sky**, **Mediaset**, **Discovery** and **Vodafone**. The analysis indicated that **Netflix**, **Amazon Prime Video**, **Timvision**, **Now Tv**, **Infinity** and **Eurosport Player** have gone from 2.3 to 5.2 million in 2017, a figure very close to the 6.5 million Pay TV subscribers in Italy (**Sky** and **Mediaset Premium**).

Regarding the number of users, since 2017 Italy has gone from 4.3 to 8.3 million, and the free services users from **YouTube**, **Raiplay**, **Mediaset Play** have risen in one year from 17.6 to 20.9 million and taking into account the overlaps between free and paid users we reach 23.8 million users. According to **It Media Consulting**, revenues from this type of services will increase from €6.26 billion euros in 2018 to €8.8 billion in 2021.

OTT MARKET SHARE, BY PLATFORMS IN UK, SPAIN, GERMANY AND NORDIC.



Sources: BARB-UK (Q4, 2018), Nielsen Sports-Spain (Jan. 2019), Goldmedia-Germany (3Q 2017), Industry data and Kagan-Nordics estimates (2017)





BBC (UK): Shane Allen, controller, comedy commissioning, Lindsay Currie, head of planning, and Dan McGolpin, controller of programming and daytime, with Dayna Donaldson, Disney



UK buyers from Swedish group MTG: Vicky Watts, senior acquisitions manager, and Vanda Rapti, SVP acquisitions, with Benedicte Steinsrud, acquisitions director Discovery Nordics



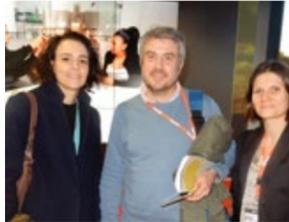
Buyers from Sky UK with the talent of the CBS' series 'A Million Little Things': Jamie Morris, Head of scheduling, Sarah Wright, director of acquisitions, Lucy Criddle, senior acquisitions manager, Zai Bennet, CCO, and Rebecca Segal, SVP



Simon Barwyck, acquisitions, iTunes



Acquisition executives from Channel 4 (UK): Ian Katz, Director of Programmes, Nick Lee, series acquisitions, Crispin Leyser, acquisitions and coproductions



Buyers from Arte (France) at The Palais: Ophélie Beaurepaire, coproductions and acquisitions executive, Alexandre Puel, deputy head of drama, and Virginie Padilla, acquisitions executive, drama



Buyers from Canal+ (France): Claire Petit, responsible of fiction acquisitions; Judith Sakarovitch, head of acquisitions, foreign fictions, and Aline Marrache-Tesseraud, SVP international acquisitions



Buyers from Groupe AB (France): Sonia Latoui, head of acquisitions; Mathilde Vaslot, responsible of fiction; Charles Touboul, content development manager, and Eric Laroche, films responsible at Canal+



France Télévisions: David Amiel, factual and documentary acquisitions; Pierrine Poubeau, documentaries and coproductions; with Silvia Angrisani, head of acquisition at Aquatic Films; and Thierry Mino, acquisitions and coproduction, FranceTV



ProSiebenSat Media, Germany: Henrik Pabst, senior executive, acquisitions, Claudia Ruelh, senior manager, content acquisitions, and Thomas Lasarzik, VP Acquisitions



Germany: Andreas Meissner, acquisition manager, Turner; Thomas Müller-Kulmann, program acquisition manager, Disney; Chris Parkhill, SVP programming, Sky; Marion Rathmann, acquisition manager, Turner



TF1 (France): Julien Degroote, head of program scouting, and Thomas Dubois, creation and development manager



Acquisition executives from M6 (France): Bernard Majani, head of acquisitions, Thomas Valentin, programming manager, Christine Bouillet, programming director, Berengere Terouanne, head of artistic selection, and Alexandre Moussard, deputy head of acquisitions



RTL Germany: Bernd Reichart, CEO RTL Vox TV, and Joerg Graf, COO Mediengruppe RTL



Public German broadcasters: Carrie Krogmann, acquisition manager, dramas at ZDF; Albrecht Bischoffshausen, head of department, ARD; Leo Hoesch, producer at Broadview TV; Jenny Sommerfeld, senior manager, ARD; and Steven Bawol, producer at Wellon Productions (USA)



Alexandra Sansen and Gepke Nederlof, both from Be Entertainment.TV with Belgium broadcasters: Thomas Van Hemeledonck, VTM, Ricus Jansegers, programming director, Nikita Kenis, producer, Davy Parmentier, creatief directeur, and Gwen Epding, head of production, Mediaaan; and Ilse Van der Velden, Be TV



Sophie Clignet, programming manager at RTBF Belgium, with RTS Switzerland: Mara Sorbera, acquisitions, Alix Nicole, acquisition manager of fictions



The Netherlands: Gerdie Snellers, editor in chief, and Mariou Wens, head of the youth, both from public broadcaster KRO



Buyers from RTL (The Netherlands): Ellen von den Berge, acquisitions, Paula van Echtelt, manager content acquisition, Wim ter Laak, SVP of programming strategy, and Inge Lubsen, senior buyer



Ireland acquisitions executives: Stephen Rooke, MD, and David Ryan, head of development, TileFilms (borders) with Bill Malone, director of programming, and Aoife Stones, head of factual, TV3 Group



Bénédicte Jouret, responsible of acquisitions, RTBF (Belgium), Maryline Thiriot, RTS (Switzerland), Francois Jadoulle, coordinator of interactive, Vincent Godfroid, responsible of programmes, both from RTBF, and Rita Boey, acquisitions, RTBF & Sonuma

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Nordic broadcasters: Tarmo Kivikallio, head of acquisitions, and Johanna Salmela, acquisitions executive, both from YLE (Finland); Maria Breme-Nielsen, programming, DR (Denmark); and Fredrik Luhn, VP programming, NRK (Norway)



Nordic buyers: Tina Moreton, senior content acquisition manager, TDL Group (Denmark), with Nina Bergan, product manager and Marit Aarø, content manager, both from Canal Digital (Norway)



Gita Peterson, acquisitions manager; and Ieva Grovedaitė, acquisitions executive, both from MTG (Sweden); Elyra Dunauskaite, VP, acquisitions of TV3 Lithuania; Andy Jan Rudovský, media manager at Prima TV (Czech Republic)



The Baltics: Indrė Zelbaitė-Ciesiuniė, deputy program director, and Marijus Gradauskas, acquisition manager, from LNK TV Group (Lithuania); with Kai Gahler, acquisitions Eesti Meedia (Estonia)



Margus Pass, head of research, Olle Mirme, head of TV channels, and Jaanus Noormets, acquisitions executive, all from Kanal2, Estonia



7152 – Andreas Niedendorfer, senior program manager and license acquisitions, Puls 4, Germany; Daniel Ebster, content acquisitions, A1 Telekom, Austria; Stefanie Groiss, general manager, Puls 4, Germany; Frank Holderied, head of program acquisitions at Red Bull Media House, Austria



Antena3 (Spain): Javier Iriarte Moreno, programming deputy manager, Carlos Fernández, content, Ramón Campos and Teresa Fernández, both from the production company Bambú; José Antonio Antón, digital content director, Lola Molina, director of Antena, and Mercedes Gamero Hoyos, head of acquisitions



Movistar+ Spain: Julián Rodríguez Montero, subdirector acquisitions, films & TV series, Sonia Salas Gutiérrez, series chief, Rubén Fernández Loa, manager, series acquisitions, and Nicolás Lecocq, senior manager, analysis and development



Buyers from RTVE (Spain): Laura Montero, delegate feature films, Toni Sevilla Ribas, content director, and Mila Mayí, head of acquisitions



Mediaset Spain at The Palais: Monica Entio, rights acquisition division, Angel Lopez, director, Mercedes Figueroa, acquisitions, and Artemis Montoya Meliá, foreign production selection



TVI Portugal: Margarida Pereira, acquisitions director, TVI; Pedro Mota Carmo, CEO, form OTT NOS; and Bruno Santos, programming director, TVI



SIC Portugal: Vanessa Tierno, head of acquisitions, Theo Wolf, programming, Nicole Correia, acquisition manager



Facundo Bailez, head of acquisitions NBCUniversal, Spain & Portugal



Regional broadcasters of Spain: Carles Blanch, head of programme acquisitions, TV3 Catalunya, Aritz Galarza, head of programming, etb, Cristina Muñoz, head of programming, TV3, José Luis Blanco, programming director, etb, Oriol Sala-Patau, head of acquisitions, TV3



Ana Izquierdo, senior manager acquisitions, Disney EMEA



Rai Italy: Sabrina Dalicco, marketing & research acquisitions, Donato Frotoiani, marketing responsible at Rai 1, Alessandro Lostia, vice director, Rai 3



Buyers from Italy: Hale Ravainia, promotions coordinator, Mediaset, Maria Laura Mozzetti, acquisition director at Fox Italy, Marco Cingoli, head of entertainment division at Palomar, Lucia del Prete, deputy head of acquisitions, and Imma Patrosino, senior acquisition manager, both from Mediaset Italy



Greek buyers: Georgios Karavokiris, business affairs, and Marialena Karagiannis, business and legal affairs, Kapa Studios; Louis Alexis Xenopoulos, program director, Skai; Nathalie Woodfield, programming director, Karolos Alkalai, general manager, and Koralia Georgakopoulou, Greek program manager, all from broadcaster Star



Fox Networks Group, Central & Eastern Europe: Olga Zhurova, head of channels, Ribere Lia, head of programming, Vessela Dimitrova, programming director, Balkans, Yadigar Metin Belbuken, VP of Thematic Channels, Turkey



Sky Italy: Antonio Visca, director of Sky Atlantic; Sonia Rovai, head of scripted department; Nils Hartmann, director of original productions; Luca Federico Cadura, GM Centurio



Buyers from Italy: Sebastiano Lombardi, deputy director Italia 1, Alessandro Saba, VP, head of entertainment channels, FNG Italy, Giacomo Poletti, deputy head of acquisitions, and Giancarlo Scheri, director of Canale 5, both from Mediaset



ATV, Turkey: Melike Ismailoglu, drama project specialist, Gurhan Ozciftci, drama team head, Mutlu Inan, Deputy General Manager, and Furhan Yesilnur, manager, in house production



Buyers from Turkish pubcaster TRT: Kurtulus Zeydan, Bany Atay, Leyla Aydogan and Farkan Gundogan



Buyers from Nacional TV (Romania): Larisa Mohut, acquisition coordinator, Anamaria Popa, acquisition manager, and Diana Stanciu, acquisition analyst



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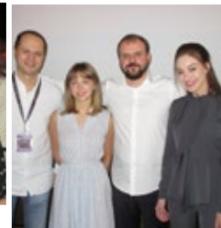
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Russian buyers: Anna Tarada, TV Licensing, Disney, Inga Koshavtseva, programming director, TV3, and Zoya Bado, senior programme manager, Viasat



TV3 Russia: Evgeny Nikishov, general producer, Valeri Fedorovich, director, TV3, with actresses Taisiya Vilikova and Yulia Franc



First TV (Russia): Maria Zolotovskaya, leading acquisitions manager, and Tatiana Palamarchuk, head of programming



Friday TV Russia: Tatiana Massova and Anastasia Korchagina



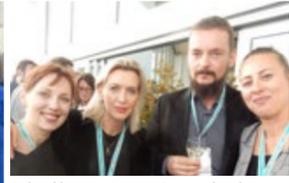
Amazon Video Europe & America: Tyler Bern, TV content acquisitions; Ani Maftvani, acquisition director; Chris Monsollilo, principal content acquisitions; Danae Kohenos, content acquisition for U.S.; Philip Pratt, senior content acquisition manager Germany, and Pablo Iacoviello, head of content acquisitions for Latin America



Turner EMEA: Patricia Hidalgo, CCO, Ranja Mohyeldin, director of Fan Engagement and Insight, and Katie Goldberg, director of communications



Russia: Maria Zolotovskaya, leading acquisition manager, and Tatiana Palamarchuk, head of programming, both from Channel One, and Olga Golubkova, from the production company, Riki



Poland buyers: Joanna Popowska, deputy director of online service, Cyfrowy Polsat; Ewa Walkiewicz, producer, Taco Media; Slawomir Cyra, head of programming, Cyfrowy Polsat; and Tamara Aagten-Margol, owner, Taco Media



Micaela Boklund, acquisition executive, Swedish Film; Magdalena Lofstrom, acquisitions, Swedish education broadcasting company, UR; Joanna Zawistowska, programming manager of NC+ (Poland); Susanne Folkesson, acquisitions, UR; and Sandra Ortiz, Swedish Film



Inara Kraukle, acquisition manager, AllMedia Baltics (Latvia), with Junita Budytyiene, head of acquisitions, LRT (Lithuania), and Ewa Dabrowska, manager of international film acquisitions, TVP (Poland)



Ukraine buyers: Olga Kishchenko, format manager, 1+1 Media, and Nadia Korotushka, project coordinator, UA Formats



Buyers from CEE: Tanja Spiranec, head of development and program strategy, TV Nova (Czech Republic); Gorge Makris, programming director, Zrinka Jankov, editorial in chief, and Nina Micola, head of acquisitions, all from Nova TV (Croatia); and Stella Lital, programming director at Pro TV (Romania)



Dexin Film, Serbia: Andela Petkovic, head of marketing, Dana Petkovic, CEO



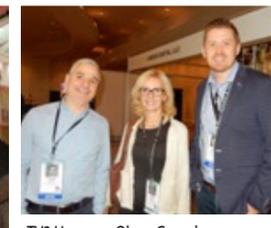
Ceska Televize (Czech Republic): Zdeno Kubina, feature films and series acquisitions; Klara Paulinyova and Jitka Bodlakova, both acquisition executives



FTV Prima (Czech Republic): Zdenka Chrzova, director of program, Pavel Nemeč, acquisition producer, and Simona Goddardová, acquisition manager



Hungarian buying heads: Tibor Forizs, director of content acquisitions, RTL Klub, and Gábor Szollosy, program director, Digital Media/Story 4 and 5



TV2 Hungary: Okros Gergely, programming director, Andrea Zaras, head of content management, and Gabor Fisher, TV cable network director



Peter Chalupa, head of acquisitions, Markiza (Slovakia), Petra Bohuslavova, acquisition manager at Nova (Czech Republic), Lucy Roberts, from DRG (USA), Julie Matelle, manager, Lagardere Studios (France), and Evelina Zukalova, CEO, Urania (Czech Republic)



Josephine Julner, acquisitions and rights manager, and Regnhild Torbeck, SVP programming and acquisitions at HBO Europe (borders), with Franca Rossander, general manager, and Peter Torkelsson, senior manager, both from Disney Nordics



Slovakia: Ivana Kollarova, international manager, RTV; Erika Tothova, head of acquisitions, TV Joj; Lubomir Nemeč, director, Content Investment (Czech Republic); and Peter Adamik, contracts manager, TV Joj



ShanTV Armenia: Laert Soghyan, executive director, Arthur Yezekyan, president



Georgian Public Broadcaster (GPB): Tinatin Berdenishvili, Director of Media & Communications, and Giorgi Gachechiladze, Head of Acquisitions



HRT Croatia: Zvezdana Djuranek, programm acquisitions, and Ranka Horvat, editor drama



Buyers from Moldova: Veaceslav Pislari, executive director, TV8, Rustam Kasymov, NATPE, Dorin Pavelescu, acquisitions, GMG Media Holding, Silvia and Eugeniu Sirbu, acquisitions from Radio Star



Bulgarian National Television buyers: Camelia Doncheva, head of acquisitions; Sevdia Shishmanova, director of program BNT1, and Vyara Ankova, general director



Tomaz Taskar, program manager, and Alenka Medic, manager assistant, both at TV3 Slovenija, with Manuela Caputi and Claudia Marra, Mediaset Italy

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The Nordics, under the spotlight



In recent years, the Nordic market has taken a stronger role on the global stage, with a fresh wind of optimism and a strong investment in more and better local programming.

‘SVT (Sweden), TV4 and TV2 Norway, DR (Denmark), TV2 Denmark and YLE (Finland) are all increasing production budgets and demand new and better scripted and non-scripted content both for their linear service as well as for their digital platforms, reconfiguring the industry and creating new opportunities for content creators’, says **Espen Huseby**, CEO and Founder, **Nordic World**.

And international success didn’t took long to arrive. First Sweden and Denmark made to brake the barriers with global hits like *The Bride* or *The Killing*, and then they were followed by Norway and Finland, with titles like **NRK’s Lilyhammer**, with three seasons at **Netflix**, or *Artico*, Finnish series



The Valhalla Murders is Netflix’s first Icelandic coproduction



NRK Norway’s Lilyhammer, with three seasons in Netflix

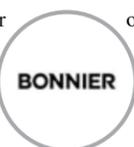


with a budget of €650,000 per episode (USD 736,300).

But behind this explosion, there were about 20 years of learning and rebuilding, and the keys have been two mainly: on the one hand, years of consumption of content from specialist countries in drama such as US and UK, among several others, and on the other, a great narrative culture and talented authors within literature, especially in the dramatic genre.

According to **Anette Rømer**, Head of Acquisitions & Formats, **TV2Denmark**, even when it’s difficult to pin point exactly what makes the Nordics different from other regions,

‘there’s an overall relaxed attitude to authorities and rules there is often room for groundbreaking ideas and creativity’. ‘Also there is a sense of inclusiveness in the mentality that makes our programs more focused on solutions, unity and togetherness rather than just exposing people and voting them



out. The tagline of TV 2 is “All That We Share”’, she adds.

Now, the challenge is to understand better the business models to reach new markets. Some already begin to open up to new territories like **YLE** (Finland), which reached a co-production agreement with **Parox** (Chile) to make its first drama in Latin America, *Invisible Heroes*, and another with **Mediapro** (Spain) for *The Paradise*.

Other key player is **NENT Group**, is the leading entertainment provider in the Nordic region. Through its premium streaming service **Viaplay** offers a combination of original productions, international films and series, kids content and live sports, while our free streaming service **Viafree** is a mix of short-form digital exclusives and linear catch-up– think TV for the millennial generation.

‘We operate the Viasat pay-TV channels across the Nordic region and free-TV channels in Denmark, Norway and Sweden. Our radio business in Sweden, where we’ve recently secured our first national licenses, is growing with double digits and we’re



Jakob Mejhede Andersen, EVP and Group Head of Content, NENT Group



Anette Rømer, Head of Acquisitions & Formats, TV2 Denmark



Lina Brounéus, director of co-productions and acquisitions, Netflix

the radio market leader in Norway. And our 3 2production companies spread across 17 countries, which together make up **NENT Studios**, create exciting content for media companies around the world’, says **Jakob Mejhede Andersen**, EVP and Group Head of Content.

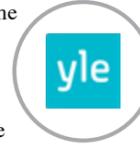
The Digital market

The Nordic SVOD market is growing rapidly, with over 45% of the Nordic households with at least one SVOD service by the end of 2018, which means a quite established market, but at same time, much more to grow. Within this year, half of all Nordic households is expected to have at least one paid streaming service.

As in many other areas, Netflix dominance in SVOD is significant with close to 3.5 million subscribing households. But despite its strong position, Netflix’ market share has been pushed down from almost 50% in spring 2016 to 40% today. Instead, local SVOD services such as Viaplay and C More, are gaining shares.

‘We see streaming as our main growth driver – there are 12 million households in the Nordic region, but fewer than half use streaming services today. Our belief is that nearly 100% will subscribe to these services in the future, and at a significantly higher rate than the current 1.4 subscriptions per streaming household. And it’s the NENT Group ecosystem, with its unique capacity to reach and monetise, that enables our investment in this huge opportunity’, describes **Jakob Mejhede Andersen**.

‘The Nordic consumer appetite for SVOD is still growing. What we see is also that the local services are gaining both in



subscribers and shares. This is of course good news for the Nordic media industry, because even when Netflix is leading, there are opportunities and space for other local players as well, specially to those to bet on local production’, remarks **Marie Nilsson**, CEO **Mediavision** (Sweden), and she adds: ‘We see signs of an increased local interest, not only in SVOD but also in advertising funded services (AVOD). Our take on this is that the big investments made by Nordic services, in content and technology, have paid off’, she adds.

‘The Nordic market don’t believe in a linear crack-down, however they are building their digital offering with optimism and are set to fight the big players like Netflix, Disney, HBO and others’, completes **Espen Huseby**.

Be local, build industry

Another key of the OTT market, is that, on-demand services means at same time that the industry and content is moving

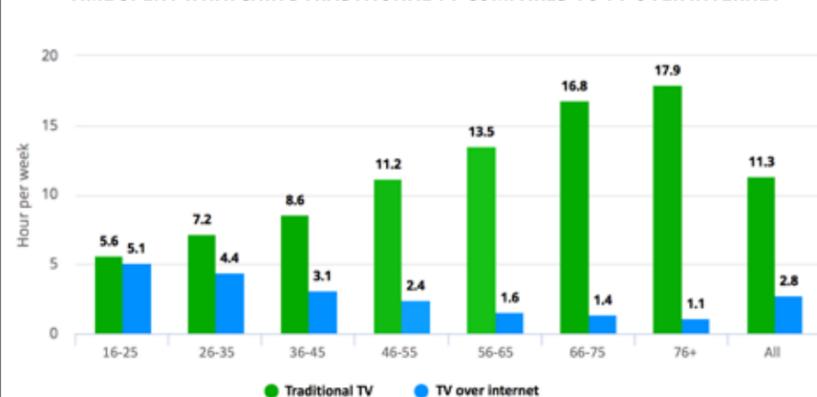
from an audience of millions to millions of audiences. So while trend-spotting is still important, there’s more space for niche shows to establish themselves, giving space to new and sometimes unexpected series.

‘Telcos and new OTT platforms with a distinct approach ‘will demand more content and new ideas to be tested as the market is in transformation’, says **Espen Huseby**, and good example is *The Valhalla Murders*, **Netflix’s** first Icelandic series, created and directed by newcomer **Þórður Pálsson** and produced by **Truenorth** and **Mystery Productions** for **RÚV**.

‘This project in general is a big result for our more ambitious and focused work at RÚV aimed at massively increasing the selection, distribution, and above all else, the quality of Icelandic TV material,’ stated **Magnús Geir Þórðarson**, director general of RÚV.

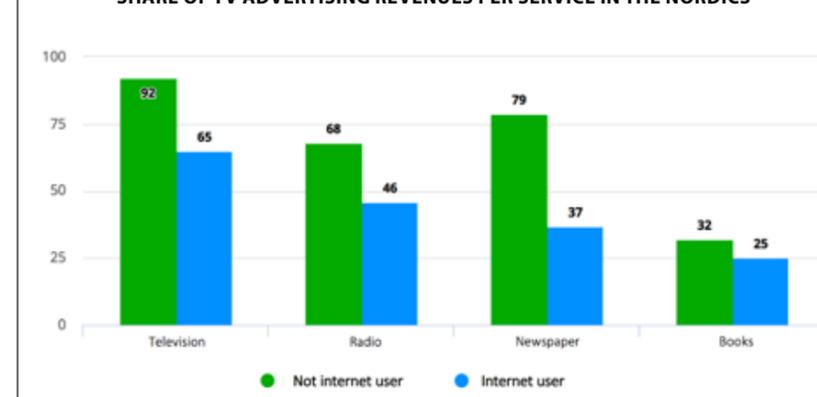
But this series, with a budget set in €5.5m (USD 6.3 million), is not the first jump on the region for the digital Titan: *Quicksand*, its first Swedish Original, was launched on April 5 this year; *The Rain*

TIME SPENT WATCHING TRADITIONAL TV COMPARED TO TV OVER INTERNET



Source: Dativa (2018)

SHARE OF TV ADVERTISING REVENUES PER SERVICE IN THE NORDICS



Source: Dativa (2018)

The Nordics, under the spotlight



(Denmark) came to its second season with **Miso Film**.

Young Wallander is an English-language based on Swedish author Henning Mankell's best-selling Kurt Wallander novels, *Ragnarok* is Netflix's first Norwegian original, from SAM Productions, and recent acquisitions include Bille August's *A Fortunate Man* and FLX's *Bonus Family*, Season 3, both from Sweden.

Lina Brounéus, director of co-productions and acquisitions, Netflix: 'We are ramping up local content in the Nordics, as part of the group's ambition to bring more than 100 non-English language series to the world, always looking for authentic, relevant and unique projects from a local viewpoint, with potential on the global market, whatever the genre'.

'When speaking about content, both drama and entertainment is at the top of



Magnús Geir Þórðarson, director general of RÚV

the lists in the Nordics. When it comes to factual entertainment and reality the key words are authenticity, big and likeable characters, an aspirational feel and subjects that resonates with the daily lives of the viewers', **Anette Rømer**, Head of Acquisitions & Formats, **TV2**, leading broadcaster in Denmark with a yearly share of 26% for the main channel and 38% for the whole family of channels, all people.

'Nordic storytelling definitely has a specific texture. I don't think there's any single element that creates this feeling, but rather the combination of writing, scenography, acting, even the lighting – it all adds up to something unique. At the same time, it's seldom generic. The



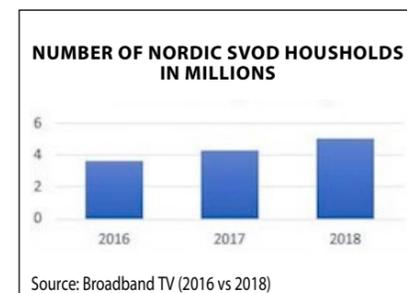
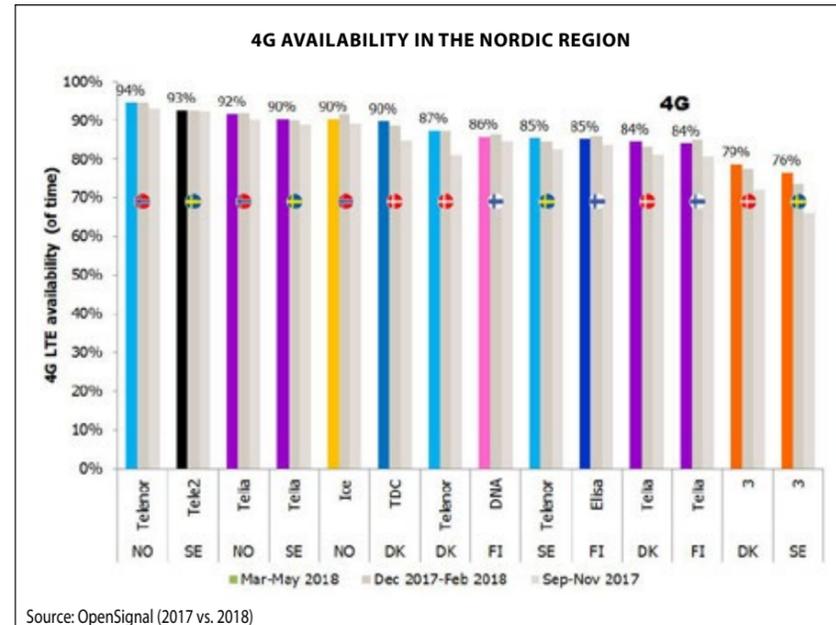
Espen Huseby, CEO and Founder, Nordic World

creative scene in the region continues to evolve (noir forms part of a broader palette...) and we know from our own experience that this storytelling travels – NENT Group has already sold nearly half of our original productions internationally', shares **Mejhede Andersen**. 'NENT Group's ambition is to premiere at least 20 original productions every year. Our most recent premieres are *Hidden*, an urban fantasy thriller starring Izabella Scorupco, and *Darkness – Those Who Kill*, which is a very intense Danish crime drama. We've recently announced *Cryptid*, an unusual noir series inspired by graphic novels, and *Commando*, an international drama created by the award-winning director Per-Olav Sørensen'.

'There is no doubt that content consuming will keep on changing at an exponential speed which is one of the reasons that we are focusing more and more on our digital business and expanding the way we develop, produce and publish our content. We are not looking into specific strategic alliances at the moment but we are always scanning the business and we are open for talks if we see a potential for TV2', completes Rømer.



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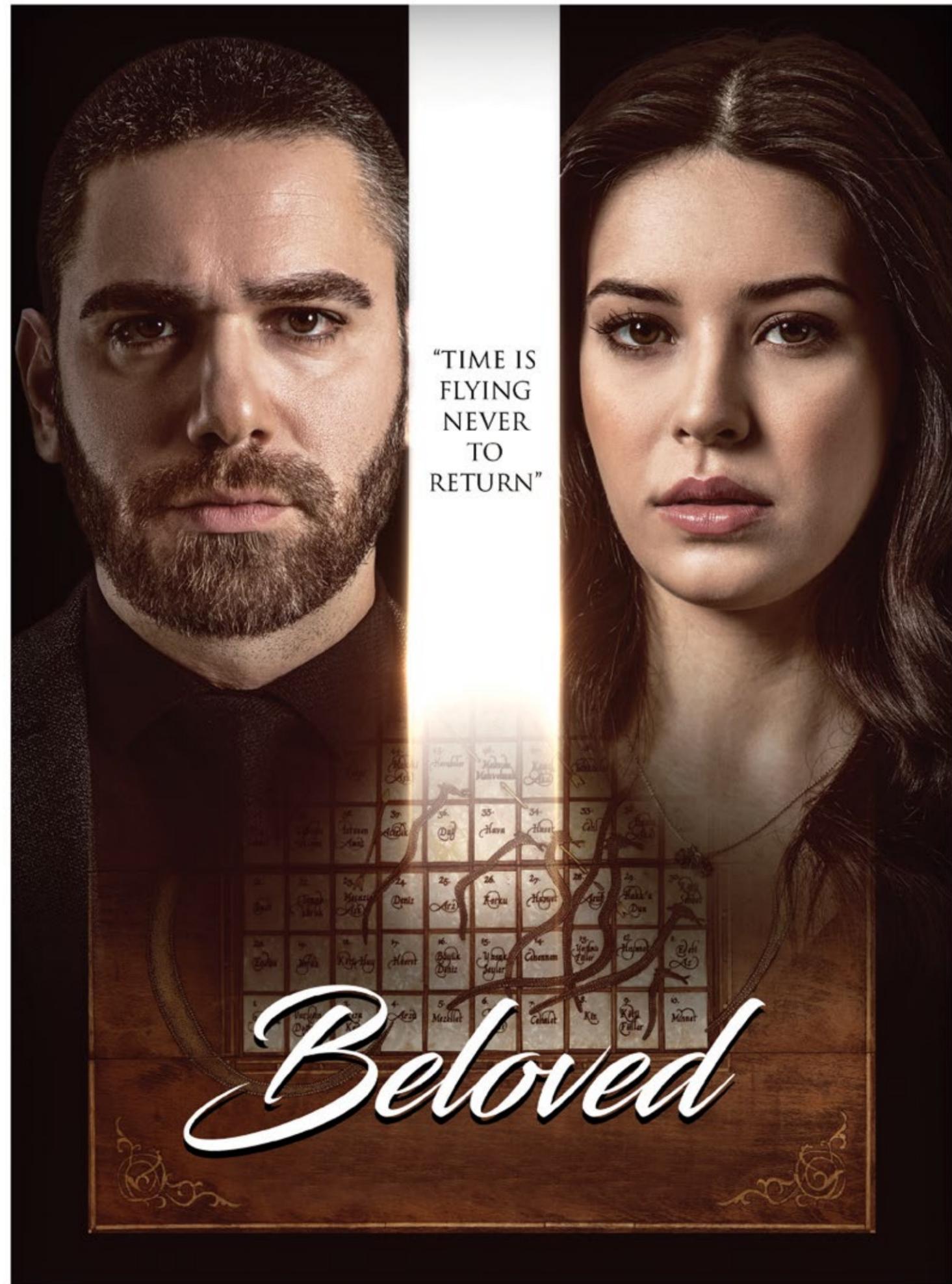
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ATV: fresh & varied



Muge Akar, content sales deputy manager

ATV Distribution (Turkey) upcoming series *Hercai* is being promoted at this MIPTV about an impossible love tale rooting from revenge. Protagonists of the series, Miran and Reyhan come from opponent families. The destiny brings them together and they fall in love. But unfortunately this won't be enough to tell their own pretty tale.

Another series *Grand Family* is back in our catalogue and it has managed to reach 4th season: it tells the story of Hızır, whom becomes a head of a mafia clique and struggles to maintain the balance between his family and his job. Also, *Lifeline* goes very well in Turkey with its 2nd season and is being highlighted as well.

Muge Akar, content sales deputy manager: 'Our premium Turkish dramas travel more than 100 countries worldwide and the recent sales include Afghanistan and Slovenia for *Lifeline*. ATV celebrates a quarter century so our drama catalogue is a very diverse one, and buyers can find the best fit for their programming grid. From daily series such as *Don't Leave Me* to a rating-record holder prime time drama *Lifeline*, or bestseller series from our classic catalogue and always a fresh series like *Hercai*'.

In Cannes, global buyers have the opportunity to screen an exotic with this latter title an atmosphere settled in Mardin, where the stunning stone mansions are very famous. Set design is supported with powerful production and the cast is also highly promising in this project.

Regarding the Turkish drama presence nowadays, Akar concludes:



Hercai, brand new series at MIPTV

'Although there is a huge demand and we are still dealing with almost 80-90 countries, the world is big enough for us to discover more. There is always a room for different formats of Turkish drama and different territories to expand'.

Universal Cinergia: focus on expansion

Universal Cinergia has been expanding in the recent years more than never, now with more executives and sales people who are covering different territories, including the appointment of **Elisa Aquino** as VP of Global Sales & Marketing. Also, the sales team continues to attend all the important content markets throughout the year.

Universal Cinergia is known throughout the entertainment world as a top professional dubbing and subtitling company with a portfolio that includes top US Studios, **Lionsgate**, **Amazon**, **Netflix**, **Echo Rights**, **Kanal D**, **Deluxe**, **Canal Plus** and several other major global media companies. The company's stellar Voice Over talent has dubbed award-winning programs such as *El Señor de Los Cielos* and *Sin Senos No Hay Paraiso*. Language specialty includes Spanish, Portuguese, English, French and Castilian with a total of 33 studios, located in Miami, São Paulo, Mexico City, Paris and Barcelona. Universal Cinergia Dubbing is a "preferred vendor" of Delux

TV Azteca: 'We like challenges'

The strategy of capturing new audiences in Free and Pay TV is giving good results to **TV Azteca**, according to **Jorge Berthely**, international sales manager, both locally and on the international distribution perspective.

'We have taken up issues with the market, now globally, and we have observed that the product is popular in many markets; it's not only about novels and documentaries, but also about several other genres of programming,' Berthely adds.

'Such is the case of *La Academia*, which goes through its 14th season in Mexico and has had local versions in countries of Central America and Malaysia, among others; the buyers with whom we talked commented that they understood that things have been done well, and this work must be used, with a focus on Europe and Africa but also Latin America, which is a priority for us. We like challenges and goals'

Among the main titles that the company highlights at MIPTV this season stands new shows like the factual series *Culture Code*, where each episode spotlights the culture of a different location, exploring what is unique about it, or *Dementia*, a series that follows a reporter that decides to admit herself into a psychiatric hospital to solve her grandmother's murder.

Maria Magdalena (60x60') is an epic melodrama recreating the life of a passionate woman during oppressing times. A woman different from the rest, one who will challenge the laws of a corrupt society entirely run by men. Lastly is *Wild by Nature*, a television series of wild nature, which deals with the endemic fauna of Mexico, narrated from a fresh, intrepid and original point of view with a message of conservation and care of our species.



Jorge Berthely, international sales manager, Patricia Jasín, VP international, and Alejandro Vega



Dementia, drama

Media and Lionsgate. The company has been dubbing most of the global Turkish dramas in Spanish and Portuguese.

'In addition to the quality which is recognized by our clients, we offer post-production services, so we can deliver the final product already mixed and ready to air. And of course our customer service is impeccable', she adds.

'Our plan is to keep expanding, supporting our sales team so that they can "hit the ground running", and of course continue attending all the major content markets. Our sales team is traveling to Canada, UK and Russia in May and June, and we are planning a tour in Asia to visit clients in China, Korea and Japan'.



Gema Lopez, COO and Lilliam Hernandez, CEO

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Kanal D: two sides stories



Kerim Emrah Turna, Executive Director

Kanal D International (Turkey) arrives to Cannes with its new distribution team and a slate headed by the brand new drama *Lost Scent*, series centered on a mysterious woman called Masal that settles into Kalender, a famous little town with its flower cultivation and essence production. She is determined to reveal the buried secrets in town for years and to take her revenge for her lost childhood as Gonca.

Price of Passion is the story of a hitman working for his criminal uncle, and a young and idealistic doctor, whose roads crossed in the most unexpected way when she is forced to operate on a man that he had shot. And at *Double Trouble* a giant drug raid brings two policemen together who have been trying to stay away from each other for years. The courage of Barca and the intelligence of the MKC ensure that the operation is successful, but the pair eventually makes a very strong common enemy.

Among the big hits of the distributor is *Wounded Love*, global success starred by Halit Ergenç and Bergüzar Korel (*1001 Nights*) that follow the story of one of the most tragic heroes of his times. A hero who is condemned to face the ruination of his family while he can do nothing to stop it. A father who is fated to be left alone by his family and by his treasured love, because of the vital secret that he cannot reveal to anyone. Lastly is *Twins*, about two very different lives... On one side; Memo, who lives in a small and loving family with his uncle and his mother. Trying to cling to life by collecting scrap pieces from the suburbs of Istanbul.



Lost Scent, new drama

On the other side; Can, who lives in the grip of his grandfather Mümtaz, in a large mansion together with his father Onur and the teachers and educators. When the paths of the two children, who live these two different lives intersect, emotional and funny stories will be experienced, big secrets will be revealed.

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MEDITERRÁNEO. MEDIASET española COMPANY



BOOTH #P-1.F74

ABS-CBN: secrets and passion

ABS-CBN's content, popular for its heartfelt Filipino stories, is made available across other territories through **ABS-CBN International Distribution**, recognized in the global arena as a reliable foreign content provider. It has been a premier source of high-quality Filipino programming in over 50 territories all over the world and has sold over 50,000 hours of content worldwide.

Among the main titles at MIPTV, the company highlights *The General's Daughter*, a story about revenge, family and love about a woman that will find herself amidst the feud of two families- her fake family and the real. While *Los Bastardos* follows a patriarch and the heir to the Cardinal empire that falls in love with an hacienda worker.

Betrayal tells the story of Lino, Jacky and their star-crossed love for each other, which began when they were still children, and *Asintado* follows two sisters separated by a tragedy and ends up in a brutal rivalry.

Now & Forever centers on a girl that becomes the long-lost heiress of the Cortes' wealth and the sole owner of the family's prized possession: nostalgia, and *The blood sisters* starts when a wealthy couple enlisted their housekeeper to carry their baby through in-vitro fertilization.

Other hot titles are *The Good Son*, where following the sudden death of the hearty Victor Buenavidez, his loved ones are left shocked by the revelation of his deepest secret: he had two families; *The Secrets of El Paraiso*, a love story unfolds when rich, cold-hearted businessman crosses paths with carefree young professional, and, last but not least, is *Alone/Together*, where two college sweethearts meet again for the first time, eight years after their breakup. Christine, who once was an over-achieving art student, has become a failure while Raf, a guy nobody thought would be a great man, is now an esteemed doctor to the barrios.



Macie F. Imperial, Head & VP, Integrated Program Acquisition & International Distribution



The General's Daughter, drama

BOOTH #R7.N1

Big launch: The Mediapro Studio

Grupo Mediapro (España) takes a step further in consolidating its international expansion and launches The Mediapro Studio, based in Barcelona and 10 creative offices around the world. In addition, it already has 34 series underway in 2019 with a global investment of euros 200 millions to produce series, movies, entertainment shows, short forms and documentaries in Spain, Italy, Portugal, UK, Finland, Colombia, Mexico, Argentina, Chile, US and the MENA region.

The structure of The Mediapro Studio, headed by **Javier Méndez Zori**, **Javier Pons** and **Laura Fernández Espeso**, covers the entire value chain, from the development, creation, production, rendering of audiovisual services, artistic direction and distribution. The Studio is also involved in the financing of new projects. This represents a paradigm shift in traditional production models in Spain with the creation of a global brand that will allow the Group to create large franchises, finance projects and control distribution rights and intellectual property, in partnership with large international partners.

Currently, The Mediapro Studio shares productions with **HBO**, **Viacom**, **Netflix**, **Amazon**, **FOX**, **Turner**, **Disney**, **Yle**, **Sony**, **Vice**, **DirecTV**, **Hulu**, **TF1**, **Televisa**, **Univision**, **Movistar**, **TVE**, **A3Media**, **Mediaset Spain** or **Globo Internacional**. Its creative teams are working on the development of 200 projects in Spain, the United States, Great Britain, Colombia, Argentina, Chile, Portugal and the Middle East. The Mediapro Studio also produces more than 5,000 hours of entertainment programs, with original formats such as *El intermedio*, *Zapeando* and *El conquistador del fin del mundo* and world franchises such as *Ninja Warriors*.

Jaume Roures, president and founder, says: 'The time has come to transcend our role as a producer to become a Studio. For 25 years we have produced hundreds of high quality projects around the world, with the ability to develop

global content, from concept to broadcast, including executive production and artistic direction. Therefore, we feel prepared to go one step further to create unique content'."

And completes **Tatxo Benet**: 'We want to be a global company, a keyplayer of the international content industry, increasing our presence globally as part of our evolution. We are very excited about this step that will allow us to expand our audience and increase our production capacity'.



Jaume Roures and Tatxo Benet, co-founders



Vota Juan, new series from Mediapro

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BOOTH #P0 A1

RMViSTAR: more alliances



Rose Marie Vega, CEO

RMViSTAR (USA), in alliance with **Glowstar**, are in constant search of new content to meet the ever-changing need of our clients for original concepts. At this market, the company presents a new line-up of formats and originals, from drama and action to reality and animation, headed by titles like *Instagram Girls* (20x60'), about twenty-four "goddesses of internet" (more than 1.5 million followers) that compete to win the most likes from the jurors, or *The Twins* (12x60'), where identical twins will challenge their team of make-up artists, stylists and hairdressers to make them different.

The company has also secured an agreement with **One Life Studio** (India) for the distribution of *Porus*, the award-winning epic series in the Americas (Spanish Language) and Spain, and from **Super8** (Brazil), is representing *Lupita*, a 3D animation of 13x7' series about a curious astronaut experiencing early childhood discoveries with 39 additional episodes in development. *Holocards Warrior* is the new 20x11' project in development about the adventure of three robot-humanoid to save their cyberworld.

'With these exclusive contents, we offer exciting investment and co-production opportunities to develop or adapt projects in all territory', says **Rose Marie Vega**, CEO.

Other hot titles include *The Makeuppers* (11x 60'), where beauty is redefined with this competition series starting with 40 ambitious and distinctive makeup artist that do more than correct defects, Brazilian series *The Motorcycle Girl* (26x45'), or *The Cleaning Lady* (13x30'), series acquired by **Turner Latin America** for a Latin remake and **Warner Bros** for an English language version.



Instagram Girls

CDC United: for all audiences

CDC United Network (Belgium) keeps growing thanks to a strategy focused on acquiring commercial titles for distribution in Latin America and systematically partnering with the most important local theatrical distributors to ensure the best possible theatrical release in the territory and with the leading Pay and Free TV stations.

Heading the slate for MIPTV is *Manou the Swift* (88'), about a small and fast Manou that grows believing that it is a seagull. Learning to fly discovers that it never will be. Surprised, he runs away from home. Meet the birds of your own species and discover who he really is. When both gulls and swifts face a dangerous threat, Manou becomes the hero of the day.



John Wick, action thriller

70 PRENSARIO INTERNATIONAL

BOOTH #C15.A8

The A List of Lionsgate

In addition to its filmed entertainment, **Lionsgate** continues to drive a growing presence in interactive and location-based entertainment, video games, e-sports and other new entertainment technologies, now also representing **Starz TV** and feature titles.

At MIPTV, the company highlights a slate headed by *Sweetbitter* (14x30'), the story of a young woman's coming-of-age, set against the rich and grimy backdrop of exclusive restaurants, conjuring a nonstop and high-adrenaline world evoking the possibility, beauty and fragility of being you and adrift. While *Vida* (16x30') is a compelling drama focusing on two Mexican-American sisters from the Eastside of Los Angeles who couldn't be more different or distanced from each other.

The A List (13x30') is set in what appears to be an idyllic island summer camp, but dark secrets will turn the "holiday of a lifetime" into a twisted nightmare, and *The Rook* (8x60') is a riveting supernatural thriller about a young woman who wakes up in a London park suffering total amnesia and is surrounded by dead bodies, all wearing latex gloves.

Other big highlights for this season are the event series *The Spanish Princess* (8x60'), the powerful story of "Catherine of Aragon", the beautiful princess of Spain promised in marriage to the future King of England, Prince Arthur. While from the comedy slate it stands *BoJack Horseman* (61x30'), about a legendary star trying to find his way back to the fame through a muddle of self-loathing, alcoholism and failed relationships, and *Now Apocalypse* (10x30'), a surreal, coming-of-age story.



Agapy Kapouranis, President, Int'l TV & Digital Distribution



The A List, drama

Leo Da Vinci: Mission Mona Lisa (85'), animated film about a young and adventurous boy that is creating an incredible invention with the help of his friends Lorenzo and Gioconda. And *Marnie's World* (84') follows four antiheroes on the run, led by a innocent and naive Marnie, a domestic cat who is not allowed to leave the house and who only knows real life on television.

Lastly are the action thrillers *John Wick* (101'), about an ex-hitman, starred by Keanu Reeves, that comes out of retirement to track down the NY gangsters that took everything from him and *Limitless* (105'), with Bradley Cooper.



Jimmy Van der Heyden, sales manager

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BOOTH #P-1.E73

IndiaCast: renewed drama

IndiaCast Media Distribution (India) assists to MIPTV with a strong and brand new drama catalogue, including new productions and new seasons of the already well-known series.

Debkumar Dasgupta, SVP & Business Head – Syndication, highlights *Bepannah* (186x'30), which shows an impossible love story of two strangers brought together by destiny: after losing their spouses in an accident, they discover that their spouses were cheating on them and were together when they died.

In *Silsila* (260x'30) two best friends, one broken marriage, and a dangerously addictive affair. Follow the dramatic twists and turns in the lives of a woman, her husband, and her best friend.



Bepannah and *Silsila*, brand new titles

Successful *Naagin* (103x'60) returns on season 3. It's a series that has redefined entertainment for a finite fiction series with supernatural mysticism at its core. It has captivated the audience in its first two editions. Taking this legacy forward, in the third series, it brings back its legacy of power, passion and revenge.

Once a debauched rock star, Ahaan has finally found his purpose in life, all thanks to Pankti. But what happens when he finds out that the love of his life has always been used by a rich man, who happens to be his uncle, is what will be answered at *Tu Aashiqui* (288x'30).

Lastly, *Ishq Ka Rang Safed* (341x'30) set amidst the traditional old city of Banaras in Northern India. Biplab is the carefree, spoilt grandson of the town leader who is slated to go abroad for his law studies. His life takes an abrupt turn when he encounters Dhaani. Dhaani, a young widow leading a life of dignity abiding by her 'dharma' is a conformist, yet a strong-minded individual.

New Films: A-list talent

Led by **Nesim Hason**, **New Films International** is a full-service production and distribution company servicing the worldwide marketplace. Acquiring, distributing, and marketing feature films and television series, NFI offers a wide variety of genres with A-list talent and an award-winning film catalog which is home to hundreds of titles. As a company on the rise, NFI also produces and co-finances a substantial amount of their own content, with the objective to reinforce themselves in this digital era.

But, according to Hason, the largest challenge in the multi-platform era is determining which content is most appropriate for each platform. 'Of course there is no product that is once-size-fits-all, but now with the growing number of platforms, more and more niches are being created. Therefore, we are putting a greater diligence toward what we can offer that will meet our clients' needs and demands'.

Peppermind: 'top of the box' production services

Peppermind (Argentina) is one of the top production services provider in Latin America, focused on big entertainment shows, branded content, concerts and live events. And it also generates own content and formats: game shows, quiz shows, etc. The company is attending MIPTV to push deals and production services alliances with the U.S. market and especially Europe.



Nicolás Grapper, Founder and CEO

Its Founder and CEO **Nicolás Grapper** has a vast experience on the entertainment business, heading the international division of **Endemol**, and working on the development of production hubs in Argentina for big shows like *The Fear Factor*, *Wiped Out* and *101 ways to leave a Gameshow*, among others. Now, the executive has formed a mix of key people from its former team and bets on replicate that *know how* at Peppermind.

Regarding the local market, Grapper highlights the combination of high production quality, talent and costs, transforming Argentina into one of the most competitive markets in the region. "We believe that in the coming semesters Argentina will become more competitive, just as it was in those golden years, not only for Peppermind but also for other producing companies, with great opportunities to develop and expand the potential for international cooperation", explains Grapper.

Peppermind has different divisions: Air, focused on the production of Free TV entertainment shows, and 'branded content', producing for advertising agencies and agents in general, apart from TV channels. About its own content, the company has created a full set with the aim to turn itself in a potential partner both for local and international players under one key concept on this new production era: cooperation. 'We believe that the future will be mainly collaborative, and we are always open to join forces. Work together to make the projects happen', completes Nicolas Grapper.



One of the production sets created, from end to end

BOOTH #P-1.C91



Nesim Hason, CEO

Among the top shows that the is launching at MIPTV this year is *The Territory*, set in a quiet provincial town. While the town's residents act as if everything is fine, the town is rotting from the inside out: teenage gangs, a corrupt mayor, a police chief involved with drug production, a brothel on the outskirts...

New York starts when the son of the head of a notorious crime family arrives in New York, escaping his past and seeking a new future. He rejects the subservience of the badly exploited foreign workers and is determined to change it. In doing so he will find his true destiny. While *Stolen Life* shows that every hospital brings drama, but the drama in this hospital cannot be compared.



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TBJ unboxes Japan's treasures

The 9th Edition of **Treasure Box Japan** presents world premieres of the latest formats from eight major Japanese terrestrial broadcasters during *MIPFormats* on Saturday April 6 from 12.15pm to 1.05pm at Debussy Theatre followed by a snack lunch and networking sessions in Foyer Debussy.

Once again, the joint project allows the Japanese industry to show their most recent developments in the format business. For decades, the country's unique creativity and innovation have inspired some of the world's most famous TV programs like *Ninja Warrior*, *Dragon's Den*, *Hole in the Wall*, among many others. Japanese broadcasters are well known for their groundbreaking creativity and vivid TV formats, so in order to strengthen its efforts to publicize them international, eight leading TV channels are exhibiting their new productions.

Nippon TV launches the crazy, action-packed game show co-created with **Red Arrow Studios** (Germany), *Beat the Rooms*; **Fuji TV**, the prank show *Endless Pranks* ('60); **TV TOKYO**, the entertainment live variety show *High School 3-C* ('30); **TBS**, the culture and edutainment format *Bukkomi Fake Busters*; **YTV**, the game show/quiz show *Brain Poker*; **TV Asahi** the romantic reality *Sweet Kiss, Bitter Kiss* ('30-'60); **ABC** the reality show/game show, *Golden Spoon: Mama is the Best!* ('30); and **NHK/NEP** the lifestyle/studio-based make-up show *Cinderella Network*.



Hisako Fujioka, Senior Manager, Program Sales, NHK Enterprises

Makito Sugiyama, Chief, International Business Center, TBS

François Grosjean, Manager, Fuji Creative Corporation

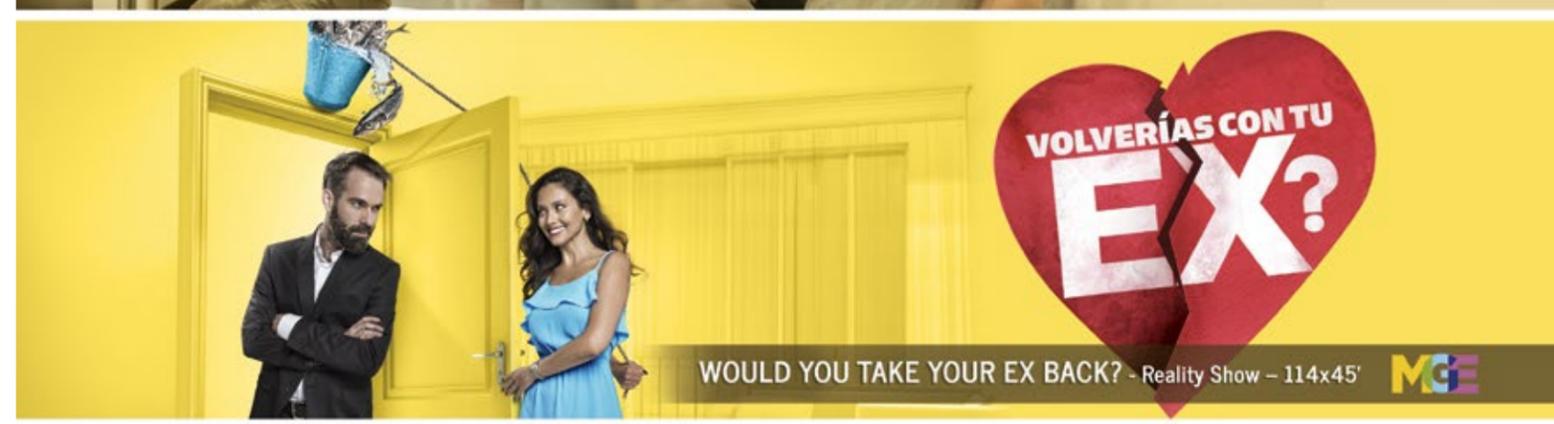
Naoko Morioka, Senior Sales Manager, TV Tokyo

Tom Miyauchi, Unscripted Format Sales, Nippon TV

Masahiko Furukawa, International Sales Manager, YTV

Tepei Yoshimura, TV Director, ABC Libra Inc.

Mayumi Nakamura, Head of Format Development and Sales, TV Asahi



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The Sony PlayStation Video acquisitions team, in Cannes: Jamila Bowden, content partnerships & promotions; Suyin Lim, senior director, content acquisitions; Andrew Varda, senior manager, content partnerships; Ruben Vidaurreta, content acquisitions; and Vanessa Lee, head of PlayStation Video Business



Imagen TV, México: Adriana Ibañez, VP de programación y contenidos, Aurelio Valcárcel, head of fiction, y Suzzette Millo, adquisición y contenidos



TV Azteca: Pedro Lascurain, director de adquisiciones, Adrián Ortega Echegollén, VP de Azteca 7 y Cable, Alberto Ciurana, Chief Content & Distribution officer, Sandra Smester, EVP de programación Azteca Uno; Ronald Day, EVP de Programación Telemundo; Alejandro Chávez Vejo, director de programación, Azteca 7, y Guillermo Bouchot, director de programación de enlatados



NBCUniversal Telemundo: Peter Blacker, EVP, revenue strategy & innovation, Ronald Day, EVP entertainment, Ana Siegel, general counsel, Ana Paula Valdovinos, VP production & development, and Ignacio Barerra, SVP sales & business development



Ana Barreto, country manager para Fox Telecolombia, junto a Ricardo de León, director de adquisiciones, y Alejandro Vazquez-Vela, network general director, ambos de MVS México



FNG Latin America: Lucas Martin, director de programación, Gabriela Gil, SVP de programación, Cristiano Lima, programming director, Sandra Morales-Lourido, VP de programación, Richard Rohrbach, SVP de adquisiciones, Gonzalo Fiure, EVP de entretenimiento, y Natalia Akel, SVP marketing Entertainment



NBCUniversal Channels: Milton Xavier, Graia Waverly, Khristopher Lorenzo, Klaudia Bermúdez Key, todos de América Latina, junto a Nicolás Robin, programming director France & Iberia



NBC Universo (US Hispanic): Jorge Balleste, VP, program acquisitions, Bilal Silar, SVP, programming, y Katsi Colon, senior counsel



Dario Turovelzky, SVP global content, y Guillermo Borensztein, VP de ventas internacionales y coproducciones, de Viacom Telefe (bordes) con Juana Uribe, VP de Caracol (Colombia); Samuel Duque Roza y Samuel Duque Duque, presidente y CEO de FoxTelecolombia; y Rodrigo Mazón, VP de adquisición de contenidos de Netflix



Caracol Colombia: Marcela Montoya, directora de adquisiciones, y Camilo Acuña, VP de programación, con Lisette Osorio, VP de Ventas Internacionales



W Studios en Mipcom: Mario Villani, VP de operaciones y estrategia, y Carlos Bardasano, presidente



Apple TV: Nicolás Vivero, Omar Ferrero y Tatiana Peres, gerente de video de iTunes, con Roberto Marinho Neto, head of sports, Globo TV



Agustin Caso Jacobs, gerente regional de Google Play/YouTube



Huawei: Michel Evans, video operations manager



Buyers digitales: Mónica Gonzalez Piris, head of content acquisitions de Digicel, con base en el Caribe, junto a ClaroVideo: Jennifer Barany, content acquisitions director, Rosemarie Morales-Saez, acquisitions manager, Adela Kabelis, acquisitions coordinator, y Claudia Bouche, content acquisitions manager



U.S. agencies: Roy Ashton, partner, head of TV Lit & Packaging, y Noah Jones, TV Lit Agent, de Gersh



Gustavo Gómez, sales MGM; Luis Stipanovic de Provideo, Liliam Bernal, jefe de gestión de programación, RCN, Edna Orozco, programación, RCN, Andrés Londoño, Provideo



Tele-Quebec, Canada: Christine Maesbracer, head of programming; Ian Oliveri, president, Quebec Content; Yann Paquet, VP, Quebec Content, and Genevieve Royer, acquisitions director (sacar a los tres de la derecha)



Sonya Davidson, manager programming, Romen Podzthun, CEO, and Jennifer Chen, VP programming, all from Channel Zero, Canada



Broadcasters from Canada: Michel Pelletier, content acquisitions, André Béraud, head of TV drama, both from CBC Radio Canada, Marie Sylvie Lefebvre, acquisitions, and Brigitte Vincent, VP, content, both from V Media, Christiane Asselin, content and programming at CBC, and Rekha Shah, CBS



Crispin Clover, director, international format, production & acquisitions, and Haley Babcock, head of format, international production and programming, A+E Networks, with Andy Ruane, co-creator, The Lyrics Board, and Michele Rodrigue, The Format People



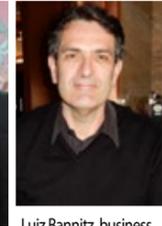
Rafael Arias Bezerra, adquisiciones y nuevos contenidos de Rede TV; Luiz Filipe Figueira, coordinador de contenidos y programación de Gloop/Gloobinho; Fernanda Tamara, coordinadora de contenidos de Canal Curta!



Record TV, Brazil: Mafran Dutra, director general de producción, Paulo Franco, superintendente de programación y artístico, y Moyses Macedo, VP



SBT, Brasil: Richard Vaun, adquisiciones, Fernando Pelegio, programming manager, y Michael Ukstin, director of programs



Luiz Bannitz, business director and head of content, Encrypta! (Brasil)



Buyers from the Brazilian SVOD service PlayKids: Fernando Collaco, head of content and Curatorship, and Danilo Agrella, content licensing



Globoplay (Brasil): Erika Bertu, co-production director, Bianca Serra, content director, y Renata Pereira, acquisitions manager



Band Brasil: Marianne de Castro, content distribution, and Elisa Ayub, acquisitions director



Paula Tabora dos Guarany, directora de contenidos y programación de Gloop/Gloobinho,



Hugo Aloy, director de Seven TV International



Compradores de Turner: Magdalena Godio, acquisitions manager, Siomara Alcantara, asistente, Andrés Mendoza, director ejecutivo de adquisiciones, Mariano Cesar, VP channel manager, Analia Pollero, acquisitions manager, y Javier Goldschmid, director de programación y producción de Chilevisión (Chile)



DirectTV Latin America: Willard Tressel, gerente general, OnDirectTV



Grey Juice Lab: Mihai Crasneanu, CEO (last from the right), with Rocio Fernandez, Content & Programming Manager, Damian Cramowicz, Latam region director, Cristina Clavera content director, and Ainhoa del Coso, legal and acquisitions director



Patricia Urias, subdirectora general de programación y contenidos, y Rosalba Aguijosa Castellanos, subdirectora de programación y adquisición, del Canal Judicial de México (bordes) con Andrea Hugemann, ventas para Latinoamérica de DW (Alemania)



Amazon Prime Video Latin America: Pablo Iacovello, head of content acquisitions, Danae Kokenos, directora de adquisiciones, Daniel Djahjah, content acquisitions para Brasil y América Latina, Francisco Morales, content acquisitions



Networks del US Hispano: Guillermo Sierra, Head of Television and Digital Services, y Erika Vogt-Lowell, directora de programación y adquisiciones, de HITN, con Doris Vogelmann, VP Programming, V-Me



Alejandro Sacasa, director de adquisición de contenidos de Albavisión



Christopher Rubi, director de programación, y Pablo Corona, VP de adquisiciones, ambos de AMC Networks (bordes), junto a Mariyah Dosani, ventas y adquisiciones de Dick Clark Productions (USA); Jacopo Fontana, de Arte Mecánica (México), y Holly Turberfield, de Red Bull Media House (UK)



Migdalys Silva, VP de programación y adquisiciones de Nickelodeon, junto a Victoria Pozzi, programming senior director, y Marisol Amaya, senior director acquisitions, ambas de Viacom



Antoine Torres, head of YouTube Kids (centro) con German Groba, director of programming strategy, y Cecilia Mendonca, VP y GM, ambos de Disney Latin America



Canal 13 (Chile): José Navarro, adquisiciones, María de los Angeles Ortiz, subdirectora de programación, y Javier Urrutia, director ejecutivo



Empresas TV Chile maneja 5 canales de TV channels: Maea García, director, strategic development, y Paulo Venegas, programming manager (borders) junto a Pablo Briceño, acquisitions, Feel (Spain)



Juan Diego Garretón, director of programming, y Loreto Gaete, manager de nuevos negocios, UCV TV (Chile) con Beatriz Cea, sales manager, Inter Medya.



Mega Chile: Juan Ignacio Vicente, director de adquisiciones, Patricio Hernández, CEO, y Marcelo Bravo, director de marketing



Carina Puffe, directora de contenidos de VTR (Chile) y Francisco Gujón, SVP, business development de A+E Networks



Turner evoluciona como estudio multipantalla



Tomás Yankelevich, EVP y CCO de Turner Latin America

Turner sigue su transformación de grupo de canales de TV a estudio multipantalla. Y a la vez, busca hacerse de producto referente y variado para atraer hacia sí las sinergias de contenidos. Esto es lo que se necesita hoy en día.

¿Qué significa ser estudio multipantalla? Producir para los canales propios y para terceros, para cualquier plataforma con modelos dinámicos que cambian según los partners y los proyectos que se tratan. Si es referente en films para

funcionan muy bien. En la producción para terceros, casos como el quiz show *Pasapalabra*, que estamos produciendo en Argentina, Chile y Uruguay, o *La Divina Comida*, que lo hemos producido en Chile y en breve también se producirá para Argentina.

Luego, otros títulos como *Bake off*, *Primera Cita*, *Overhulin Argentina*, *Un pequeño gran viaje*, con Iván de Pineda, *Privet Rusia*... generamos contenidos muy variados'.

'Los modelos en entretenimiento suelen ser distintos a los de ficción. Generamos la producción, los canales de TV abierta lo emiten afrontando una parte de los costos y nos quedamos con los derechos. En scripted en general el canal invierte fuerte y se queda con el IP. Nosotros lo que solemos hacer son estrenos simultáneos donde participan tres ventanas complementarias, TV abierta, cable y OTT, compartiendo los derechos. Más allá de uno u otro modelo, lo importante es lograr experiencias productivas y que se alimente el conjunto', agrega el ejecutivo.

La oferta de Turner hoy incluye el material tradicional de Hollywood, películas nuevas, series locales, deportes, espectáculos y cada vez más non scripted, productos propios y para terceros, y además rubricó un acuerdo con Warner Bros para la representación de la venta de sus formatos con la exclusividad de producción para América Latina. A los hubs de producción en Argentina y Chile, se han sumado Perú, Brasil y México.



Un gallo para Esculapio

turner

El otro pilar desde ya es la producción original. 'Tenemos más de 70 proyectos abiertos hoy en análisis, para llegar a 15 productos propios en el año. Hoy estamos muy dedicados a impulsar las usinas de Brasil y México, siguiendo las de Argentina y Chile que

'Llevo ya dos años en Turner y la misión es transformarnos de un grupo de adquisiciones a otro que genera contenido original y se queda con el IP, para seguirlo impulsando. Cada vez más somos esta segunda condición. Hay que evolucionar en forma progresiva, contemplando todos los aspectos del negocio para no perder ingresos, pero es clave el cambio. No se trata sólo de tener contenido original, también es el know how y el músculo para llevar adelante toda la operatoria'.

'Por eso, dentro de los procesos un gran desafío ha sido la conformación del equipo de trabajo, la transformación es producto no de una persona sino de los logros del conjunto. Por ejemplo, hemos dejado de tener responsables cross para tener especialistas verticales, en scripted, non scripted, marketing, content syndication, adquisiciones... cada área necesita estar profundizada sinergisándose. ¿Qué más se viene? El futuro es lo que se ve, hay que darle sustentabilidad y productividad a través del tiempo'.



Un pequeño gran viaje, con Iván de Pineda



Otros Pecados, serie producida junto a eltrece y Cablevisión en Argentina

TOP 20 DE TV PAGA, POR CANAL		
MULTI-COUNTRY		
Rank	Canal	rat%
1	Cartoon Network	0.77
2	Discovery Kids	0.61
2	FOX Channel	0.61
4	Space	0.56
5	TNT	0.55
6	Disney Channel	0.53
7	AXN	0.45
8	Warner	0.44
9	Disney Jr	0.42
10	TNT Series	0.40
11	Nickelodeon	0.39
12	Cinemax	0.35
12	TL Novelas	0.35
14	Discovery Channel	0.34
15	Disney XD	0.33
16	Discovery Home & Health	0.29
16	FX	0.29
16	Universal TV	0.29
19	Boomerang	0.28
20	History	0.25

Fuente: KANTAR Ibope Media

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Chilevisión: 'Flexibilizar la transmisión y generar contenidos relevantes'



Javier Goldschmied, director de Programación de Chilevisión

2018 fue un excelente año para Chilevisión: pasó del tercer al segundo lugar en sintonía gracias a un cambio estratégico en el contenido en el que se focalizó en los contenidos familiares y en empujar a un co-visualizado de sus programas. Así, potenció su prime time con shows como *Pasapalabra*, *Bake off*, *La Noche es Nuestra*, *La Divina Comida* e *Invincibles* y con ello, logró 10,3 puntos de rating hogar y 4,4 en rating comercial, con lo que se ubicó en el segundo lugar de la franja.

Javier Goldschmied, director de Programación, comenta: 'En el bloque matinal también logramos un hito histórico: por primera vez *La Mañana* se ubicó en el segundo lugar en su horario con un promedio de 5,3 puntos de rating. También logramos excelentes resultados con eventos deportivos como *Copa América Femenina* donde promediamos 20,2 puntos de rating hogar y 8,1 de rating comercial, ubicándonos en el primer lugar del horario. Lo mismo sucedió con los amistosos de la selección Chilena de Fútbol masculina que promediaron 30,5 puntos hogar y 11,9 de rating comercial'.

Para 2019, habrá una serie de cambios enfocados a fortalecer su estrategia familiar y profundizando el co-visualizado: 'En ese sentido destacamos dos bloques: uno es la renovación del bloque matinal con *Contigo en la Mañana*, más ciudadano y con información en la calle y de utilidad, al que le sigue *Viva la Pipol*, una propuesta dinámica y diferente', añade.

'También habrá un cambio en el prime de los viernes con *PH: Podemos Hablar*, donde tendremos una oferta de contenidos nunca antes vista en Chile en ese horario: un programa de conversación que nos dará una nueva mirada de gente muy relevante en el país, desde sus historias personales hasta su visión de lo que está pasando al país', aporta **Goldschmied**.

Sobre el mercado chileno, comenta: 'La TV está viviendo un contexto similar a lo que ocurre a nivel mundial: un menor encendido, audiencias más complejas de atraer, competidores



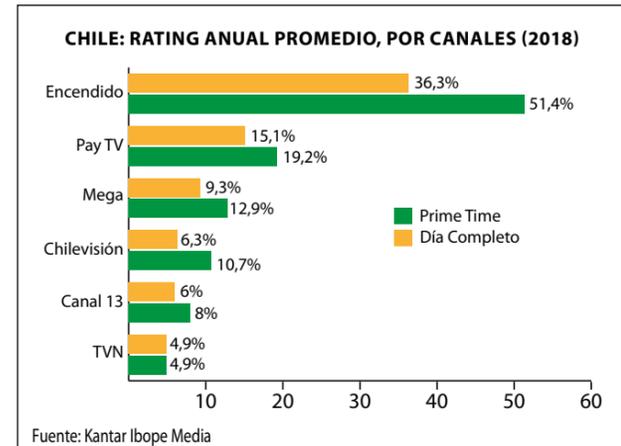
Contigo en la Mañana y Viva la Pipol, dos opciones para reforzar la mañana

multiformatos y nuevas formas de consumo que tensionan la linealidad de la televisión actual. Desde **Turner Chile** y **Chilevisión** trabajamos en una estrategia de difusión de contenidos que permita flexibilizar el actual modelo de transmisión, que atraiga por su alto valor de relevancia y que pueda ser consumido y transmitido fácilmente por redes sociales'.

'En la TV abierta la audiencia busca compartir emociones colectivas que permitan generar vínculos instantáneos. Un gran ejemplo son los deportes, que es un tipo de contenido que es irreplicable y que tiene un valor en su consumo en directo. En otras plataformas lo que vemos es un consumo flexible, más aislado y que genera microcomunidades que no interactúan entre sí'.

'En estos dos mundo estamos pensando en un mayor control de parte de la audiencia, siempre considerando que el lineal tiene un valor que sigue siendo clave para la industria', subraya **Goldschmied**.

Y concluye: 'Distribuimos el contenido principalmente por nuestra pantalla lineal, pero nuestra audiencia puede seguir distintos programas a través de nuestro sitio web o consumir lo más importante por redes sociales'.



Chilevisión potenció su prime time con shows como *La Noche es Nuestra* e *Invincibles*

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Contar: rompiendo barreras



Martín Lucas, jefe de gabinete del Sfmyp, junto a Eduardo Apolonio, programación de Contar, y Mariano Kon y Ronnie Amendolara del área internacional



A un año de su lanzamiento, **Contenidos Argentinos (Contar)**, plataforma del Sistema Federal de Medios y Contenidos Públicos (Sfmyp) ha mostrado una importante evolución, tanto a nivel local como internacional

Por un lado, se trata del SVOD local de

contenidos producidos y por producirse; por otro, es la plataforma online desde donde compradores globales pueden revisar el contenido para adquisiciones bajo cerca de 10 categorías. Finalmente, trabaja como agente comercial, buscando internacionalizar los contenidos argentinos en el mundo.

Uno de los grandes drivers desde su lanzamiento ha sido la ficción: la primera temporada de *El Marginal* fue visto por más de 500.000 usuarios cada episodio, disponible luego de la emisión en TV abierta (catch up). Si se tiene en cuenta la audiencia en la **TV Pública**, en la que promedió 10 puntos de rating con picos de 13 puntos (cada emisión se posicionó segundo en el ranking), puede decirse que ambas plataformas se complementaron perfectamente logrando grandes resultados.

‘Estamos muy felices con los resultados, pero sabemos que esto es solo el comienzo. Hay un potencial enorme de desarrollar nuevas vetas’, dijo **Martín Lucas**, jefe de gabinete.

‘En cuanto al OTT, la plataforma tiene miles de títulos disponibles para visualización online, entre los que hay ficción, infantiles, documentales, entre otros. ‘Sin dudas hemos dado un paso en la modernización del sistema de medios públicos. Contar no compite, complementa el alcance de nuestros contenidos’, completa.

Sobre el negocio internacional, además de distribuir esos títulos, el objetivo de Contar es más ambicioso. Ronnie Amendolara y Mariano Kon explican: ‘Participamos en MIPCOM pasado por segundo año consecutivo, y haremos lo propio en MIPTV, mercados donde destacamos un nutrido catálogo entre los que se sobresa la ficción, con unas 200 horas’.



Sobremesa, producción original de Contar

‘Pero además, estamos interesados en construir una imagen de Contar como player estratégico para la coproducción, hacia Argentina y hacia el mundo. Ese es un rol que nos interesa destacar por sobre todas las cosas. Queremos transformarnos en un agente clave del negocio internacional para los contenidos argentinos, participando desde el primer momento’, concluyen los ejecutivos.



Viacom: ‘La fuerza puesta al servicio’

A casi un año del lanzamiento del **Viacom International Studios (VIS)** el balance de la empresa ha sido altamente positivo. Con esta nueva usina de desarrollo, producción y distribución para todo el mundo, que unifica las plataformas de **Viacom International Media Networks**, **Telefe** (Argentina) y **Porta dos Fundos** (Brasil), la empresa ha logrado posicionarse como ‘líderes en la provisión de contenidos de alta calidad, de todos los géneros y para todo tipo de audiencias, tanto en español como en portugués’, según indica **Federico Cuervo**, SVP Head de VIS.



Federico Cuervo, SVP Head de VIS

Bajo este nuevo esquema de distribución de contenido, VIS ha cerrado en los últimos meses varios acuerdos con clientes clave en todo el mundo. Entre los más destacados, el ejecutivo destaca el lanzamiento de las películas *Animal*, con **FOX**, y *Re-Loca*, con **Paramount Pictures** y protagonizado por **Natalia Oreiro**; la serie infantojuvenil *Club57* con la italiana **Rainbow Group**, y *Noobees*, también de Nickelodeon, junto a **Mediapro**, con emisiones en **RCN** (Colombia). ‘Además estamos trabajando muy fuerte con los players digitales, con proyectos como *Homens de Porta dos fundos* y *Dani Who*, ambas para Amazon; y *R*, para **ClaroVideo**, entre otros, y trabajando en más formatos, como el reality de supervivencia *Resistiré*, en coproducción con **Mega** (Chile) y licenciada a **TV Azteca** en México, que ya es un suceso de audiencia’, agrega Cuervo.

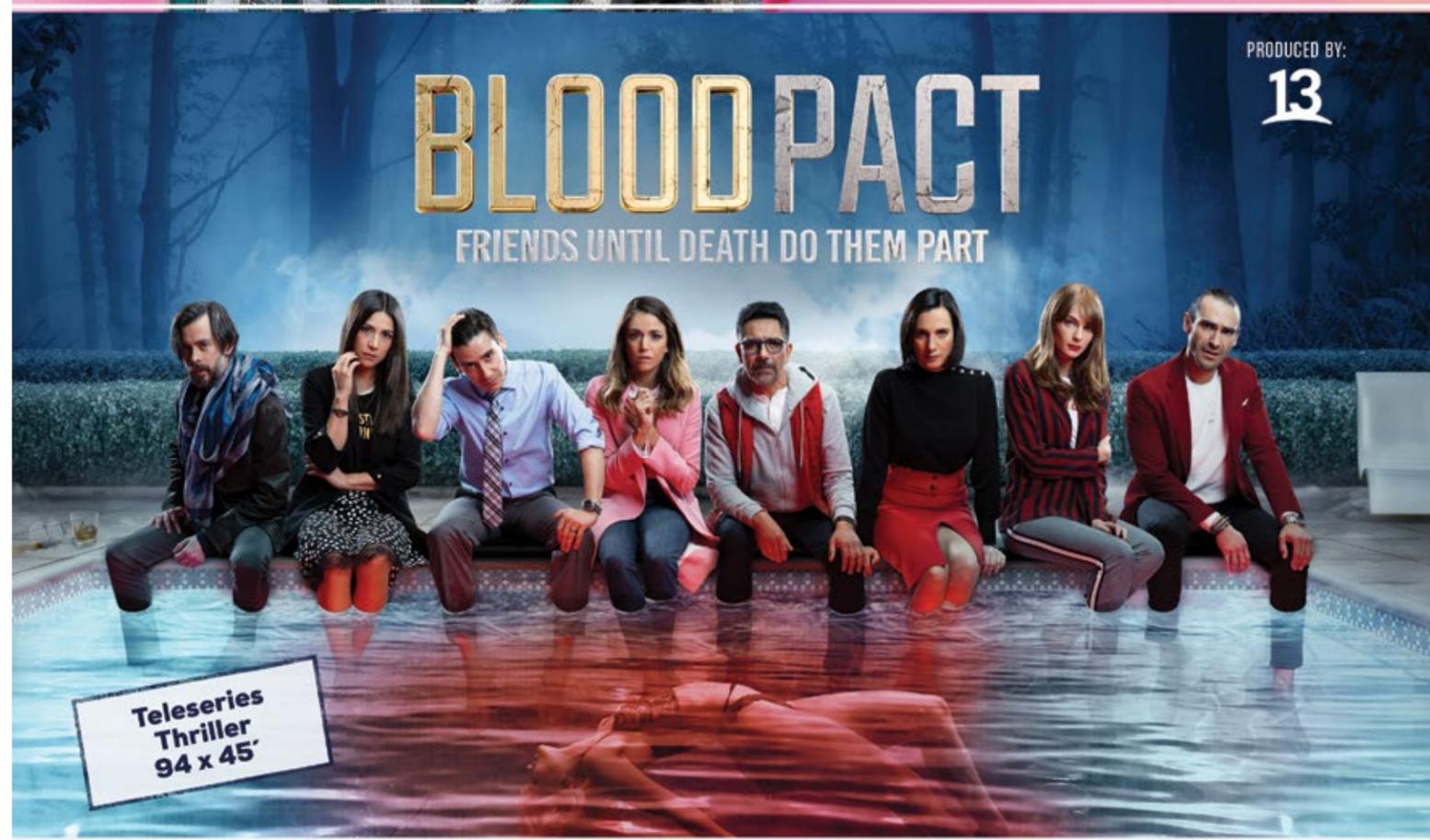
Otra gran novedad es *Atrapa a un Ladrón*, serie basada en la película de Alfred Hitchcock y en co-producción con Paramount Channel en Europa. ‘La industria está en pleno proceso de transformación y evolución. Los comportamientos de consumo de contenido audiovisual cambian y eso requiere una adaptación constante para poder capitalizar la inversión en contenidos de manera rápida, dinámica y efectiva. No sabemos dónde terminará este proceso, pero el contenido de calidad siempre será demandado. Por eso la necesidad de poner foco en esta área’, señala el ejecutivo.

‘El público está cada vez más selectivo y demanda contenido de calidad, que lo sorprenda todo el tiempo. En este proceso de transiciones clave el rol de la creatividad y la innovación. Por eso hemos armado un equipo muy sólido de desarrollo y producción para llegar a la audiencia en cualquier plataforma, propia o de otros. Nuestro foco es desarrollar y producir buenas historias para todo tipo de audiencia, contenidos atractivos tanto para el público infantil como para el adulto’.

‘En definitiva, la fuerza de Viacom puesta al servicio de los contenidos de calidad’, completa el ejecutivo.



Atrapa a un Ladrón, coproducción con Paramount Channel en Europa





The New players on the block

Disney+ prepara su lanzamiento



Disney+, OTT que la compañía lanzará a fin de año, incluirá en su catálogo todos los títulos que Disney produjo a lo largo de su historia, según confirmó **Bob Iger**, CEO de la empresa, durante la reunión anual de accionistas que tuvo lugar la semana pasada.

'Disney+ combinará lo que llamamos producto de biblioteca, películas y TV, con un montón de productos originales. Y, en algún momento, poco después del lanzamiento, albergará todo el catálogo de películas de Disney. Luego, por supuesto, estamos produciendo una serie de películas y programas de TV originales que también tendrán la marca Disney', informó Iger.

La plataforma de Disney ofrecerá a los suscriptores películas clásicas como *Dumbo* y *Blancanieves*, junto a otros títulos más modernos como *Frozen* y *Zootopía*. Entre las nuevas producciones, se confirmó la serie de acción en vivo de *Star Wars* denominada *The Mandalorian*, y una serie original de **Marvel**.

Movistar Play llega a México



Telefónica México lanzará año brindar su servicio de TV por streaming a través de su aplicación *Movistar Play*, según confirmó **Carlos Morales Paulín**, presidente de la firma en ese país.

'En Telefónica ya tenemos un servicio que se llama *Movistar Play*, un servicio OTT que tiene mucho contenido y que ya se ofrece en otros servicios de otros países. Queremos que salga pronto en México, probablemente este año', aseguró el CEO de la compañía.

Cabe recordar que el 6 de junio de 2018 entró en vigencia la Concesión Única, aprobada el Instituto Federal de Telecomunicaciones (IFT), que permite a Telefónica prestar cualquier servicio de telecomunicaciones, y el grupo español promete aprovechar esta oportunidad para dar contenido vía streaming a partir de este año.



Pantaya, más local



Lionsgate y **Hemisphere Media Group** anunciaron que su servicio en español **Pantaya** lanzará este otoño la primera serie original en español de su historia: *El Juego de las Llaves* (The Game of Keys), que constará de 10 episodios y un elenco encabezado por Maite Perroni.

Con la producción ya en marcha en la Ciudad de México, esta comedia cuenta con un importante elenco de estrellas y debutará de forma exclusiva en USA a través de la plataforma, que está también disponible a nivel internacional en más de 200 países y territorios a través de Amazon Prime Video.

'El Juego de las Llaves será una cita ineludible para el grueso de nuestro público en Estados Unidos, y algo completamente distinto a lo visto hasta ahora en este espacio', completó Mario Almeida, VP de desarrollo, programación y adquisiciones de Pantaya.



Gravitas Ventures lanza nuevo SVOD



Gravitas Ventures, empresa de **Red Arrow Studios**, lanzó su servicio de SVOD *Gravitas Movies*, disponible en USA a través de *Xfinity X1* de **Comcast**, junto con **Apple TV** y dispositivos **iOS**, **Roku**, **Amazon Fire TV**, así como **Android** y **Android TV**. Se espera su lanzamiento mundial a finales de este verano.

'Al lanzar nuestro servicio SVOD, estamos dando el siguiente paso para llevar nuestra vasta biblioteca de películas a una audiencia global', dijo el presidente de Gravitas Ventures, **Michael Murphy**. 'Dado el volumen, la diversidad de programación y la frecuencia de actualización, tenemos una de las mejores propuestas de valor en el mercado hoy en día para los fanáticos de las películas y documentales independientes y planeamos mantener la oferta fresca y nueva en los próximos años'.

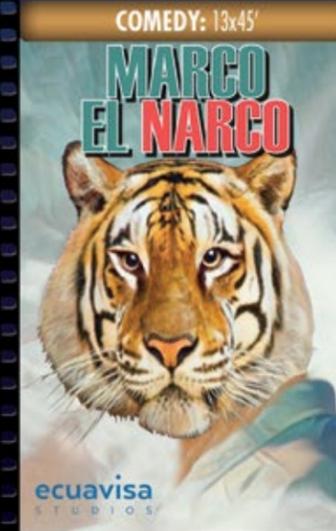


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Smart Cities: la oportunidad de Latinoamérica

Las Smart Cities en Latinoamérica apuestan por varias áreas de desarrollo: sostenibilidad medioambiental, transporte, empleo, seguridad y competitividad. En base a un informe de Markets&Markets, se espera que el tamaño del mercado de las ciudades inteligentes aumente de USD 308.000 millones en 2018 a USD 717.200 millones para 2023, a una tasa de crecimiento anual compuesta (CAGR) de 18.4% durante ese período.

La región es el área en desarrollo con mayor tasa de urbanización del planeta. La tendencia estimada por las Naciones Unidas indica que, en 2050, el 90 % de su población habitará en megaciudades (áreas metropolitanas de más de 10 millones de personas), que se han convertido en los puntos focales del desarrollo latinoamericano.

Frente a esta creciente urbanización, se hace imperativo planificar las ciudades, logrando que estas sean cada vez más sustentables, inclusivas y tecnológicas. Si no existe planificación, la urbanización creciente podría dañar el medioambiente y acelerar el cambio climático, impactar negativamente en los niveles de pobreza y desigualdad, entre otras consecuencias perjudiciales para la calidad de vida de las personas.

Ya hay varios proyectos de ciudades inteligentes que han avanzado a lo largo de los años y hoy comienzan a dar buenos resultados. Por ejemplo, Medellín, en Colombia, es la única ciudad de la región con un tiempo para llegar al lugar de trabajo inferior a la media mundial gracias a la implantación de tecnología inteligente para la gestión del tráfico y el transporte. Mediante el uso de videocámaras, semáforos con sensores y autobuses con más sensores, pueden monitorear en tiempo real el tráfico y ofrecer a los conductores las mejores rutas. Así se ha logrado evitar grandes tiempos de congestión e incluso accidentes viales.

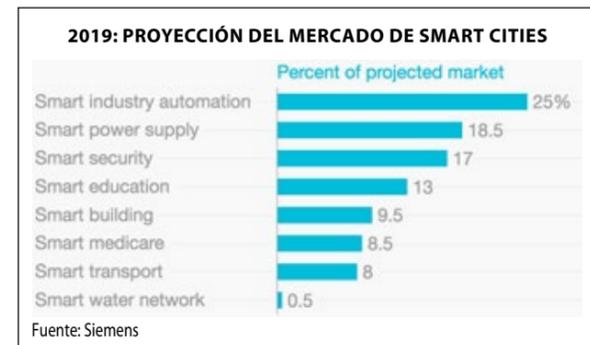
Santiago de Chile en Chile también resalta

por su lucha decidida contra la contaminación del aire, particularmente en el invierno. En este punto son cruciales los planes para aliviar las congestiones provocadas por el tráfico. Esto se ve dificultado porque el área metropolitana se compone por 34 comunidades independientes, cada una con su propio alcalde.

Por su parte, Buenos Aires ha combinado la renovación urbana con el desarrollo de clúster mediante la inversión en nuevas infraestructuras en zonas en decadencia. En los últimos años, ha incorporado nueva tecnología, diseño, arte, producción audiovisual, farmacéutica e industria de entretenimiento.

Bogotá ha sufrido una transformación impresionante. Con problemas de tráfico, ha diseñado planes muy ambiciosos para abordar este problema. Su sistema tipo BRT (*Bus Rapid Transit*), que se llama *Transmilenio*, está entre la más extensos y utilizados sistemas en el mundo.

Ciudad de México ha sido pionera en la región en varias áreas asociadas con la Smart City. Se ha erigido como líder en Gobernanza en América Latina, y también ha sido pionera en la promoción de edificios inteligentes y verdes. De hecho, son una de las primeras ciudades en el mundo a experimentar con la tecnología que permite realmente absorber



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BOOTH #R9.A30

Intermedya: success on real time



Can Okan, at last Natpe Miami

Intermedya (Turkey) is now one of the main global distributors of the international market. It is one of the flags of the Turkish boom, but the company has also learnt to evolve with the market. Today apart from premium series, it provides entertainment formats and participates in important creation, production ventures.

Can Okan, CEO: 'Now one of our most successful, non-traditional products is *Exathlon*, a format where competition meets reality in a high level. We have 75 episodes and we are producing local versions in different countries of the world. In Latin America for instance we are making focus, having already the program in Mexico, Colombia and the US Hispanic market'.

Intermedya is 27 years old, reaching the global market since 1992. 'We always want to be a creative and dynamic company, open to any business model. For years the Turkish dramas were produced by national producers and we focused on global distribution. But now the market often requires to take part in the different steps of business. Now we make co-productions with those producers and we are open to any international cross-regions venture'.

What makes the difference in a Turkish drama against other origins? **Okán** responds: 'Most of the scripted series are written from the beginning to the end, especially the short series. In Turkey, the companies prepare from 3 to 7-8 episodes, and the rest is produced in real time during the emission process, changing story and characters relevance depending on public feedback. You need a special know how to do this, but it is great to give what the public wants'.

'We want to apply the same spirit in the different areas we manage. From now, we will continue improving quality product and diversification. Turkish companies are in a great moment, but it is just a step in the evolution'.



Bitter Lands

MGM, expanding barriers



Barry Poznick, president, unscripted TV, Tomás Davison, SVP distribution Latin America, both from MGM; Patricio Wills, president Televisa Studios; Matt Vasallo (MGM); Frank Scheuermann (Televisa); Ludovic Attal (MGM); Eduardo Bandera (Televisa) and Alexander Bushnell (MGM)

MGM is taking a much more leading role in Latin America. On the one hand it produced with **Gato Grande Luis Miguel**, one of the most successful biopics of 2018 that in 2019 reaches several open TV. On the other hand, he incorporated **Tomás Davison** (former Warner) as SVP of distribution and opened offices in Miami. In Natpe he organized a cocktail and announced a great deal with **Televisa**, which will be his production hub for the region and the world of *TKO*, reality of competitions.

Chris Ottinger: 'We are evolving as the market demands. To our traditional films, which continue in great time with many strong releases, we add series. Then we made the agreement with Mark Burnett to access a leading catalog of entertainment formats. Many think that fiction will go to OTT and open TV entertainment, so we must be strong on both fronts. And the next step is to develop local strategies region by region, to grow qualitatively.

MGM's commitment to Latin America is firm, to the extent of incorporating Latin actors into its productions, etc. Luis Miguel was a great push and we will continue: with Gato Grande now it is planned to do three series (two short and one long) and two films, there will be a lot of activity.

Regarding the agreement with **Televisa** for *TKO*: 'It is very much in tune with the new times, to promote both formats of entertainment apart from fiction, and to vary the business to the services part. Televisa is going to produce 24 episodes for its screen and there is the set and the *know how* for the productions that come. We will do a lot of this from here on'.

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BOOTH #C20

Banijay bets on non-English language



Elliott Chalkley, VP of Sales

Since the acquisition of **Zodiak Media** in 2016, **BanijayGroup** has reinforced its global presence as one of the main format producers and distributors, and now bets on expanding along with non-English dramas.

Elliott Chalkley, VP of Sales, describes: 'Our unique network of production companies around the world has the expertise to know what will and won't work with local broadcasters so we can meet the expectations of the market. Working with our third-party, co-productions partners we can share creative vision, genuine interest in the subject and have agreed parameters from the start'.

At MIPTV, highlights a new line up of drama series and explosive new entertainment formats like *Catch!*, in which four teams of four players compete against each other in games inspired by variations on the timeless game of 'catch'.

On drama, he remarks that, as more and more non-English language slots become available, along with the internationalisation of shows, 'we are able to have more flexibility when looking at new productions'.



Hierro is the first series in Spanish language from Banijay

'We have seen a surge of interest in our formats which are highly adaptable and have universal appeal. *Hierro* is our first series in the Spanish language and it's great to represent such a high-quality series with the boom in Spanish fiction and, indeed, all non-English language fiction, such as *Wisting* from Norway'.

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BOOTH #P0.B1

Caracol TV: world-class content



Lisette Osorio, VP International Sales

Caracol TV (Colombia) has become during last years on a true powerhouse, expanding its influence beyond Colombia through its world-class International Channel and International distribution division, **Caracol Internacional** and thanks to a slate of high-end dramas and super series like the new *The Good Bandit* (60x60'), the story of a mafia boss who decides to change his life and get away from the crimes, and sins of the past, to become an honest man. Now, he will have to leave the criminal world, be faithful to his wife, raise his children away from easy money and take his old band of criminals out of crime. His path to redemption will be complicated as he will have to make a huge effort to get away from the temptations that the world brings outside of the law.

Based on the controversial life of Luis Eduardo Díaz, a shoeshiner who ran for office and managed to occupy an important political position, *Big Steps* (80x60') will give viewers the chance to learn about the controversial life of "Lucho," who went from living in poverty to become a national celebrity overnight, and will learn about the wealth and corruption surrounding the political world. While *One Way Out* (80x60') is a story of a crossing of lives. Parallel stories that take place in the Bronx neighborhood, a dangerous sector of town with a mixture of failure, disappointment and despair of thousands of drug addicts, drug dealers, merchants of dreams, and interspersed with love, faith and strong fraternity links.



The Good Bandit, new comedy

BOOTH #P-1.F55

Sony India: "Costume Drama"



Rohit Gupta, Chief Revenue Officer, Ad Sales and International Business, Sales

Sony Pictures Networks India (SPN), one of India's leading media conglomerate is a subsidiary of **Sony Corporation**, which owns the **Sony** entertainment network that today operates 29 channels in the general entertainment, movies and sports. It also has the VOD **SonyLIV** and a film production division, **Sony Pictures Networks Productions** (SPNP).

SPN's content library spans over 60,000 hours of original programming, and it distributes its TV networks across different

genres and languages through multiple platforms. The company's unwavering endeavor over the last 24 years has been to provide entertainment to every segment of the diverse audience groups.

Some of the key shows are *Colours of Love*, *It seems so beautiful* and *Unconditional Love*. A genre in which it has pushed the limits is 'Costume Drama'. SPN has narrated potent stories that connect with the masses in the most aesthetic manner, such as *Aladdin- You would've heard the name* and *The Story of Lord Ganesha*.

On kids, distributor offering blends action, emotion and adventure: *Kicko & Super Speedo*, *Guru and Bhole* and *Mahabharata*. The company also presents some of its fiction titles as a formats, including *The only Lady in the House* and *It's all about Entertainment*.



Aladdin- You would've heard the name

Rohit Gupta, Chief Revenue Officer: 'As we gather momentum to establish our presence in new markets, we see a great opportunity in Latin America that has shown a high propensity to consume Indian content, which is very encouraging for us'.

Mediterráneo, a combined offer

Mediterráneo Audiovisual is the new name of **Mediaset España** in the global marketplace, gathering all eight participated producers of the Group plus **Telecinco Cinema** and international channel **CincoMAS**. Series, formats, movies, sports and digital contents are available through this company that is being launched this MIPTV, led by **Ana Bustamante**.

'We want to optimize costs, increase the company billings inside and outside Spain, and to reinforce the access to ours and third-parties produces to formats and international markets', she explains.

In Cannes the company promotes a strong fiction slate headed by the political thriller *State Secrets* (13eps.) around the assassination attempt of the Spanish Prime Minister, and the dark comedy *Dangerous Moms* (13eps) selected at MIPDrama Summit. On entertainment, the prime-time show *My House Is Your House*, whose format



Dangerous Moms, selected at MIPDrama

Nippon TV: stronger than ever

Nippon TV (Japan) launches its brand new game show co-developed with **Red Arrow Studios** (Germany), *Beat the Rooms*, plus five new scripted formats *Weakest Beast*, *May Tomorrow Bring Sunshine*, *The Happy Prince*, *Love of My Life* and *Without Family*, as well as finished dramas *Mr. Hiiragi's Homeroom*, *Your Home is My Business!-2nd Attack* and *Your Turn to Kill* (two consecutive seasons).

Kako Kuwahara, MD, IBD: 'Our long-running entertainment shows *The Quest* and *The Tetsuwan Dash!* are the top two most-watched Japanese programs. Making in the Top 5 are dramas *Mr. Hiiragi's...* and *Your Home...* (to be remade in China), also part of our international offering at MIPTV. We focus our efforts on those genres equally'.

The company has been recognized globally for 3 winner dramas that have been adapted in Turkey for a further global expansion: *Mother*, whose original version is now dubbed in Spanish for Latin America, *Woman and anone*. **Kuwahara**: 'Cultural tastes and preferences are now so sophisticated and expanded that many countries are feeling ready to produce remakes. We have proven in China, South Korea, Thailand, Indonesia and Singapore with formats such as *Dragons' Den*, *Silent Library*, *Old Enough!* and *Pharaoh!*.

Successes in Turkey, China and South Korea have kept doors for new opportunities open. There is a growing appetite in Southeast Asia for entertainment formats that exude originality, so *Old Enough!* and *Silent Library* have found new homes in Singapore and Thailand'.



Kako Kuwahara, managing director, International Business Development



Weakest Beast, brand new scripted format from Nippon TV



Ana Bustamante, director general

is being produced for **Rai 3** (Italia) with singer **Rafaella Carrá** as the host. 'It is our first format sale, working along with Italian producer **Ballandi**', she adds.

Bustamante highlights the social experiment *Full House Swap* (**Boxfish**) about 2 different families that exchange their homes, routines and works to show their adaptation capacity... and convictions. And the docuserie *Mónica y el Sexo* (8eps) starred by Spanish singer **Mónica Naranjo** who starts a trip to Japan, Mexico and Brazil to discover different ways to live sexuality.

'We aim to expand **Mediterráneo** as a reference brand from Spain. We are present in 190 territories with **Mediaset España**. In addition to being a leading Spanish broadcaster, we also position ourselves as possible partners to develop new productions outside Spain thanks to our in-house production companies', concludes **Bustamante**.



Aladdin

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R7.L15

RTVE: fiction and reality



Rodolfo Domínguez, commercial director

RTVE has gained recognition in the international market as one of the top Spanish drama providers. At MIPTV the company brings the new thriller *La Caza: Monteperdido*, which presents the struggle of parents, and of a whole people, to re-channel their lives after the disappearance of two girls.

Promesas de arena is, first of all, a story of love and friendship taken to the limit; an exciting journey without return to a territory where everything, including life and death, are negotiable and where the protagonist must choose between loyalty and passion. Filmed in a fascinating environment, the port city of Sfax and the oasis of Tozeur in Tunisia, presents the harsh reality that will face a volunteer of an NGO that comes loaded with illusions and good intentions to a refugee camp in a city from Libya. While *Hospital Valle Norte* is a series for prime time whose plot will be centered on the surgical team of a university hospital. A mix of realistic drama, urban comedy and romance in which the protagonists will face complex medical cases and will also have to keep their personal lives separate.

Other hot titles are *Derecho a soñar*, new series whose main action is developed in a major law firm. It addresses real-life cases that will allow the audience to connect with fiction; *Asesinato en la Universidad*, TV movie set at the University of Salamanca and whose plot takes place in the sixteenth century and today, and a slate of documentaries headed by *¡Ay, Carmen!*, about the actress Carmen Maura; *Tesoros de la corona*, series in which a tour is made through the set of architectural treasures guarded by the National Heritage, and *Ciencia Forense*, new docu-fiction that reconstructs and recounts, as a thriller, mysterious and shocking cases of Spanish forensic criminology, among several other titles.

C15.A6

Kew Media: haunted stories



María Ibarra, director of sales and distribution

Kew Media Distribution arrives to the market with the largest new programming slate of the company to date, full of high calibre, according to **María Ibarra**, director of sales and distribution. 'We are always working with our partners to devise



Haunted Hospitals Season 2, non-fiction series

new and innovative business models, strengthening and influencing multi-platform deals for our wide-ranging content. Our scripted team is instrumental in sourcing powerful programming from all parts of the world that has strong appeal to platforms, broadcasters and, of course, audiences'.

At MIPTV, Ibarra recommends titles like *Clink* (10x60'), a drama; *The Dead Lands* (8x60'), based on the globally successful film of the same name, and *Leaving Neverland*, documentary about the Michael Jackson's abuse cases.

R7.F7

Mediaset: The Silence of Water

Mediaset Distribution comes to Cannes with a program roster topped by 2 new series: the mystery thriller series *The Silence of Water* (8x50' episodes produced by **Vela Film** and **RTI**), a show that starts with the disappearance of the adolescent Laura Mancini. Since the beginning of the investigation led by cop Andrea Baldini, the dramatic and disquieting event, brings to light the dark side and secrets hidden behind the proper facade of a small village on the sea. The series launched on Friday 8 March in prime time recorded 3364 million viewers with an audience share of 15.3%.

Also, the medical drama *Doctor Giò*, about a gynecologist that is back to her hospital after being suspended, following a lawsuit against her which was instigated by the influential Professor Monti, head of the hospital. There had been a tragedy regarding Monti's wife who seemingly committed suicide by throwing herself out of a window at the hospital. Doctor Giò had tried to shed light on what happened because she knew that the Professor's wife had been victim of violence at home. The new season recently launched by **Canale 5** in prime time achieved a good average share of 3 million viewers. **Manuela Caputi**: 'With these titles we are in line with the needs of the market in genres and topics. A medical procedural drama, *Doctor Giò*, with a strong feminine character on one side and on the other an investigative thriller with a disquieting story set in a small community with *The Silence of Water*'.

The strong alliance with **MGE**, the distributor arm of **Mega** (Chile) launched in mid-2018, continues intensely and the catalogue of Chilean novelas starts conquering the trust of our clients and awakening strong interest.



Manuela Caputi, head of international sales



The Silence of Water, new thriller

Showlab expand and evolves

Showlab has tapped **Micheline Azoury** to led the new distribution and acquisition kids content division of the Italian production company. With a large experience built at the Italian animation group Mondo TV, **Azoury** will push the company's acquisition and international sales strategy and development of new IP's and new activities.

Showlab is **Prodea Group S.p.A.**'s media division: an Italian prodco that stands out for the production of prime time TV shows, factual and entertainment formats for the last 8 years. In the past three it has been focusing on programs for kids and young audiences, such as the animated pre-school series *YoYo* co-produced with **RAI Fiction**, **Grid Animation** and **Telegael**.

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BOOTH #1, P-1.L50

Telefilms suma su quinto Oscar



Tomás Darcyl, presidente Grupo Telefilms

Telefilms (Argentina) consiguió su quinto Oscar a la “Mejor Película” por *Green Book* en la reciente edición de los Premios de la Academia. Se trata además de la cuarta en solo ocho años, con grandes obras como *Million Dollar Baby*, *El Discurso del Rey*, *El Artista* y *Moonlight* como predecesoras.

Green Book está contextualizada en los 60’s y cuenta la historia de un agente, interpretado por **Viggo Mortensen** (*El Señor de los Anillos*, *Capitán Fantástico*) de seguridad del club nocturno neoyorquino Coppacabana que es despedido y se convertirá en el chofer de un prestigioso pianista, quien contratará sus servicios para una gira por la zona sur de USA. Allí enfrentará a los prejuicios raciales propios de la época.

Con más de 1.000 millones de visualizaciones, *After* es otro de los destacados de la compañía para esta temporada, habiéndose convertido en el mayor fenómeno de la historia de la plataforma **Wattpad**, mientras que *Uglydolls* es una película animada con voces de Pitbull, Kelly Clarkson, Blake Shelton, Wanda Sykes, Gabriel Iglesias, Wang Leehom,

Nick Jonas, Emma Roberts, Janelle Monáe, Charli XCX, Lizzo, y *Scary Stories*, un largometraje apadrinado por Guillermo del Toro que tendrá su estreno en agosto en USA.

Finalmente están *Ben Is Back* con **Julia Roberts** y la comedia romántica *Second Act*, donde **Jennifer Lopez** interpreta a una trabajadora que reinventa su vida.

Alfred Haber: Hitched In Vegas

Alfred Haber Distribution, one of the world’s largest distributors of U.S. network annual events and music specials, launches at MIPTV the new reality show *Hitched In Vegas* (10x60’), a unique series that follows loving couples and their wedding parties through the most exciting, elaborate and entertaining wedding adventures ever in the Wedding Capital of the World.

On its 20th edition, it comes the Annual Latin Grammy Awards (180’), one of the biggest celebration yet of the spirited performances and exceptional productions that highlight the dynamic world of Latin music. The milestone *20th Latin Grammy Awards* continues to serve as the international musical showcase for Latin talent, diversity, relevance...and excellence.

At *Elvis All-Star Tribute* (120’) top superstars Jennifer Lopez, Ed Sheeran, Shawn Mendes, Blake Shelton, Keith Urban, John Legend, and more, celebrate the 50th anniversary of Elvis Presley’s legendary 1968 *Comeback Special* that helped him reclaim his crown as the “King of Rock ‘n’ Roll.” while *Shallow Grave* (8x60’) is a crime and investigation series about a murders that have been committed

elsewhere, likely cleaned of evidence, and then dumped at what investigators call “the deposition site” or shallow grave.

Lastly is **CBS’ Motown 60: A Grammy Celebration** (120’), a brand-new salute to the legendary record label features an all-star line-up of performers .



Alfred Haber, president



Hitched In Vegas, new reality show



Rooster House, series from Zip Zap

BOOTH #P0.A10

Audiovisual from Spain, to the world

Audiovisual from Spain, the umbrella that supports the Spanish companies in the global business, highlights in Cannes a good number of creators from its representatives, including drama series, documentaries, feature films, formats, animation, and other innovative services.

Atresmedia exhibits the brand new drama *Presumed Guilty* (13x’70), about a scientific living in Paris who is forced to return to the village where he was born because of the death of his father, and **MediaBank** recommends *Mr. Emmett & Canned Peaches*, about a man that finds himself reliving his failure over and over and will try any means necessary to succeed at winning her girlfriend.

Zip Zap’s Rooster House mixes music, funny videos, artist interviews and animation characters; **Filmmax’s Welcome To The Family** takes a comical look at the institution of family, and **Onza Distribution** launches *Little Coincidences*, comedy about a 37-year

old woman who just opened her own fashion store.

Wild Stories presents its brand new documentary series *Super Predators* (10x52’), a fascinating 4K series that travels to the corners of the earth in search of the world’s most amazing Predators; **D’Ocon Films** highlights *The Fruitties*, centered on a community of peaceful and cheerful fruits and vegetables that live in a supposedly inactive volcano, and **Mediterráneo Audiovisual** recommends *State Secrets* (13x75’) Political thriller around the assassination attempt of the Prime Minister that will unearth some hidden secrets from his reliable people. Last but not least, *Filmmarket*, which is promoting its online marketplace for films with TV projects in development, **Teleformat** is an observatory of formats and **DLM International** is dedicated to broadcast and DVD translation.

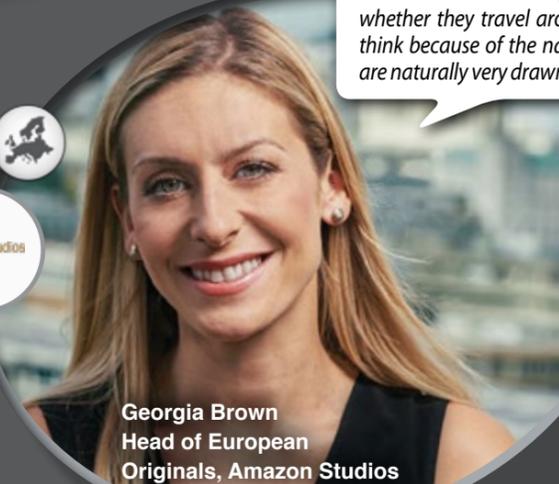


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Phrases and concepts: Where is the content industry going?



amazonstudios

Georgia Brown
Head of European Originals, Amazon Studios

'We want to be local, we're not judged on whether they travel around the world or not, I think because of the nature of who we are, we are naturally very drawn to international stories'



NETFLIX

Francisco Ramos
VP Original Productions, Netflix

'We continue to bet on local stories, with local talents and the quality of well-told stories. We are focused on creating personal experiences'



ZDF

Frank Seyberth
Commissioner, Series and International Co-Productions, ZDF (Germany)

'Being a public broadcaster does not necessarily mean we have to reach everyone, it's a lot about relevance. Our game is to be the quality producer on the market'



turner

Ricky Ow,
president, Turner APAC

'Brands are important, localization too. It is has become necessary to transform and reinvent with a consumer-focused strategy: business models and content will keep shifting, but if we center on the consumer, we will not fail'



CBS ALL ACCESS

Julie McNamara
EVP, Original Content, CBS All Access (USA)

'If you become a service that is only known for IP, you're not relevant anymore. You have to create creative swings'



Roku

Bernarda Duarte
director content acquisition, Roku (USA)

'Alliances with content producers are important to ensure the rapid distribution of programming on all screens. The speed of the response will allow us to better monetize everything we bring to the audience'



GLOBO

Carlos Henrique Schroeder, CEO, Globo (Brazil)

'We are more open to the future, to new partners but also new business models. The market is evolving but the good stories that can awake big emotions are still the differentials to success'



ABC

Sally Riley
Head of Scripted, ABC (Australia)

'What distinguished us is that our content is Australian – we have to have something Australian in everything, we make about 40-45 hours of drama each year. I like spiky content that challenges people's perceptions, and I also like shows that have a purpose of changing the world'

BOOTH #C16.A

Talpa: exhilarating content

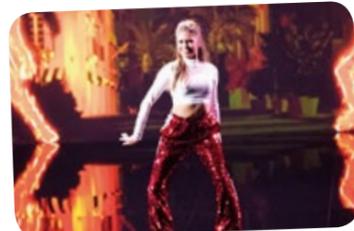


Marteen Meijjs, COO

Talpa Global (The Netherlands) arrives to Cannes armed with a vast slate of formats headed by *DanceSing* (86'), an exhilarating new talent show for all-round superstars. It seeks out for talents who can both sing and dance at the highest level.

In *The Desert* (90'), competitors are taken away from the urban jungle and placed in the heart of the world's most unforgiving environment: the desert. After 100 days, 2 remaining finalists will compete in an epic 3-day solitary race through the desert; while *The Loved Ones* (10x50') is a dramedy about 4 families with complete opposite parenting styles. Despite their social and cultural differences, they often face common problems because they all raise teenagers. Social media, peer pressure, drugs, sex... The parents have set the bar very high for themselves and their beloved offspring. Because life must above all be perfect.

Lastly, the company introduces for this season the social experiment *Home Alone* (6x40'), to be launched in August 26th



DanceSing, new talent show

2019 on SBS6. In each episode, five kids are challenged to live on their own for an entire weekend while their parents are just next door, watching and commenting on their child's every move. The children are confronted with tasks like shopping and team challenges. How will these kids behave without their parents?

BOOTH #R7.J11

Filmax: animation and dramas

Filmax Internacional, Spanish company with over 60 years in the film industry and keeps moving forward.

By one hand, it arrives to Cannes with a robust slate of new films, where it stands 4 animation films for the family to be launch in Spain this 2019: 'We have started the year with the successful premiere of



Welcome to the Family, black comedy on its second season

Los Lunnis, the first film with the popular children's characters of RTVE. In April we will premiere *Bikes*, the first official co-production between Spain and China, in July we will premiere *Elcano & Magallanes - The First Return to the World*, an adventure film that arrives just in the year that commemorates the 500th

CMF: 'Linear TV is not dead yet'

The **Canada Media Fund** (CMF), entity that fosters, promotes, develops and finances the production of Canadian content and relevant applications, highlights at its new report the -still- relevance of Linear TV in the local market.

In the screen-based industries the hot topic for the past few years have been OTT streaming services such as **Netflix**, **Hulu**, and **Amazon Prime**, moreover in Canada, there are also the OTT/streaming offerings such as **Crave**, **Alt TV**, **Ignite**, and **Illico** from **Bell**, **Rogers**, **Corus**, and **Videotron**. Together, Canadians spend about \$1B annually on these on-demand options, making it easy to see how the rumour mill gets churning about the death of traditional TV.

A closer look at the viewing habits of Canadians would suggest that rumblings about the death of linear TV in Canada have been overstated, at least for the moment. A December 2018 report that tracks cord cutting behaviour in Canada reports that about 75% of Canadian households still use non-OTT delivery channels such as cable or satellite TV.

For many there's a comfort in the relationship between established viewing habits and push models of TV programming. According to **GlobalWebIndex**, Canada ranks #9 in the world in linear television viewing, and the linear TV numbers are particularly striking for francophone Canadians.

Research from Media Technology Monitor (MTM) issued in January 2019 provides additional insights into the distinct viewing habits of Canadians. It reports on a phenomenon in Canada known as 'cord jumping,' in which people with a subscription to either OTT or cable services cancel them, but with the intention of subscribing again in the future.

anniversary of the beginning of such a famous expedition, and our biggest title will arrive at the end of the year, when we will have the long awaited film about the beloved children's character *La Gallina Turuleca*, describes **Ivan Díaz**, director international.

By the other with a growing slate of TV dramas, where the company highlights the second season of the successful *Welcome to the Family*, the black comedy series that charts the troubles and adventures of a lovable, but dysfunctional family. Season one is available worldwide on **Netflix**, while the second season has debuted on **TV3** successfully in Spain in January 2019.

BOOTH #P-1.A 0



Valerie Creighton, President and CEO



Ivan Diaz, director international

"WELCOME TO THE FAMILY JUST KEEPS GETTING BETTER AND BETTER." EL PERIODICO



WELCOME TO THE FAMILY



R9.A8

HBO Latin America: now documentaries



Xavier Aristumuño

HBO Latin America arrives for first time to MIPDoc to show that is much more than a high-value scripted developer. In Cannes the company launches *Guerras Ajenas* (67'), a documentary from the land of narco-violence to the land of displaced persons, a documentary on the effects of the war on drugs in Colombia, and one of its main tools: aerial spraying. In the fight against drug trafficking, Colombia has tried to eliminate the cultivation

of the cocaine leaf with aerial irrigation of glyphosate, this fumigation is supported by the United States, which is seen by peasants as punishment and by specialists as a failure.

Based on the journalistic account of the same name by Daniela Arbex, *Brazilian Holocaust* (90') exposes one of the greatest tragedies in the recent history of Brazil. At the beginning of the last century in Barbacena, Minas Gerais, the Colônia Hospital was founded. Ostensibly, its purpose was to treat tuberculosis patients and the mentally ill. Yet what lies hidden behind its walls is a truly appalling story.

On the scripted side, the company pushes at MIPTV the fourth season of *Psi*, drama created by renowned psychiatrist Contardo Calligaris that closely examine cases of paranoia; *The Bronze Garden*, Season 2 (8x60'),

which delves into a new storyline written by Gustavo Malajovich, and marks the return of Joaquín Furriel as Fabián Danubio, the architect who spent years desperately searching for his lost daughter, Moira. In this season, Furriel will take on the role of an investigator, exclusively devoting himself to an old, unsolved case. Lastly is *Secret Life of Couples*, Season 2 (10x60), where sexologist and therapist Sofia Prado directs a center for alternative therapies for couples.



Brazilian Holocaust, new documentary

Pol-ka: love and revenge



Roberto Lorenzi, general manager, and Manuel Martí, international production, both from Pol-Ka, with Mariana Dell Elce, from INCAA

Pol-Ka Producciones (Argentina) bets strong in this 2019 for its new drama *Argentina, Tierra de amor y venganza*, a series set in the '30 that starred with big figures like **Benjamín Vicuña**, **Gonzalo Heredia** and **Eugenia "China" Suárez**, and the Spanish actor **Albert Baró** (*Merlí*), among several others. The series has as a trigger two friends who are involved in the horror of the Civil War

of their country but who manage to get away with the life of that hell. The friendship that overcomes sowing in those times of adversity is corrupted by betrayal.

This superproduction reached an average of 13.7 rating points on its

BOOTH #R7.K5

Telefe/Viacom: 'be innovative & creative'

Two years after the integration of **Telefe** (Argentina), one year since the acquisition of a majority stake in **Porta dos Fundos** (Brazil), and only 7 months since the launch of **Viacom International Studios** (VIS), **Viacom** has transformed its business model, accentuating the vision of a Studio that can work with its own brands, but that has flexibility when developing with different partners, as explained by **Guillermo Borensztein**, VP.



Guillermo Borensztein, VP

'The balance is positive, we are happy to have grown in production volumes (Brazil, Mexico, Colombia, Argentina) and that the billing of the area has accompanied us. We can affirm that it was a record year for our new integrated division, increasing our position by selling content and co-production in all regions, with a decisive weight in the Americas and strong growth in Europe', says Borensztein and highlights the big moment of the Spanish language series.

'Today, there is an increasingly important space and opportunity. New players have appeared who managed to make massive productions that were previously only recognized madly'.

According to the executive, much has to do with the evolution in the way of counting traditional genres, the blend between genres, the duration of the cycles, the realization budgets, the talent of other worlds (film case) that is constantly committed to these projects, etc. 'Our strategy is to be protagonists, to innovate when creating new projects; but also be creative in our way of interacting with partners and customers. With a strong commitment to distribution (to grow other business lines such as licenses), and local production in association with key players', he concludes.



Lindsay Lohan's Beach Club, reality



Argentina, Tierra de amor y venganza, new big drama

debut, leading its time slot and becoming the most watched show of the day.

Other highlights are *Mi Hermano es un Clon* (120x60'), where, as a result of genetic manipulation, one of the brothers is born with a superior intelligence but no heart, and the other, with a big heart but not very clever, while *Sólo Vos* (225x60') is a romantic comedy full of moments funny, encounters and disagreements, infidelity, reconciliation and hatred that will eventually lead to true love.

Sos Mi Hombre (189x60') follows a former boxer who is now forced to face much tougher opponents: his poor financial situation, his anguish and his ongoing struggle for the custody of his son, *Secretos de Familia* (20x60'), series on intrafamilial relations, and *Farsantes* (123x60') tells the secrets of a law firm run by a relentless and ruthless lawyer.



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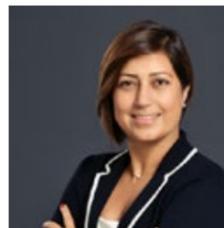
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BOOTH #P-1.J69

MADD grows and evolves



Özlem Özsümbül, International Sales Director

Since its launch in October 2018, **MADD Entertainment** (Turkey) has transformed into another key asset to spread the Turkish series worldwide, formed by two leading prodcos **Medyapim** and **Ay Yapim**.

An aggressive global strategy has been implemented by its international sales director, **Özlem Özsümbül**, who has been attending all the tradeshow and is doing so this MIPTV with a strong team headed

by **Ates Ince**, managing director, and **Deniz Cantutan**, sales manager.

Heading the slate is *One Litre of Tears* (39x'45), about an 18-year-old girl, a freshman in the university who is diagnosed with an incurable disease, and *Burning Obsession* (168x'45) about a girl born in the suburbs and grown up in the servants' quarter of a mansion where her father has worked as a gardener.

Crash (+100x'45) is an action series about a man that lost his wife and daughter in a terrorist act, while *My Little Girl* (+100x'45) has been one of the most sold title from the distributor with deals in CEE (in Greece it secured DVD and TV rights) and Latin America.

In this last region, the first title has been sold to **Mega** (Chile), **Telefe** (Argentina) and **Latina** (Peru); second title has been sold to these three plus **Canal 10** (Uruguay) and **Unitel** (Bolivia). 'All the other Latin American

countries are on the way to acquire these titles. Having these prodcos as shareholders, we will always have a "lucky" position in the market', remarks **Ince**.

Lastly, **Puhutv** series *Persona* (12x'60 and *Phi* (22x'60), as well as *The 8th Day* (17x'45) and *Wings of Love* (73x'45).



My Little Girl got several key sales across Europe and Latin America

D.I.N.T: 'Rigor and quality must go hand in hand'

D.I.N.T (Chile) celebrates 38 years of constant growing, and adding new studios in order to increase of digital platforms and number of signals in the audiovisual map of the industry. **Paola Barzelatto**, VP of the new offices in Miami, where they are also offering dubbing to Portuguese and English, describes: 'we already have 18, and we will continue to grow'.

Christian Barzelatto, President, adds: '2018 created new ties with important companies, we are happy with the results, with the numbers and with the quality of our dubbing that always goes in search of excellence. This is reflected in our customers who increasingly trust us. This is a very competitive industry, where seriousness, rigor and quality must always go hand in hand, and that's what we are'.

Regarding the 2019 projects, the company continue to work on the new seasons of **Discovery Channel's** most emblematic series, such as *Deadliest Catch*, *Naked & Afraid*, *Bear Grills*, and *Gold Rush*. With **Fox**,

Dori Media: crime and drama

Dori Media highlights at MIPTV its new crime thriller *The Drop* (10x50'), a series about the huge number missing people disappearing daily in Bolivia. Raquel is a fugitive single mother whose teen daughter disappears. Pato is a TV reporter obsessed with sex trafficking cases. Jorge is an alcoholic ex soccer star whose son is ill. Desperate for money for the cure, Jorge kidnaps and sells Raquel's daughter to a human trafficking network. After his son dies, Jorge will do anything to get the girl back, pulling all of them together into a world of power games, sex cravings and violence in search for redemption.

In *Shepherd* (72x60'), a former homicide detective 'drinks-to-forget' and finds himself in the middle of several crime investigations including the murder of his mentor that police claim was a suicide, while *Dumb*, crime drama about a frustrated and stoned 30-year-old actress who goes undercover as a student in high school trying to help her arrested ex-boyfriend who was charged with drug dealing, arrives on its third season.

Other big title is *On Board* (13x30'), about a flight attendant in international flights and a blogger. As long as she cares of her work, she keeps on curiously watching the passengers: loneliness men and women, families, couples or groups of friends or just workmates. Everyone hides some secret that she tries to reveal... or just has fun imaging it.

While from the unscripted side it stands *Vloggers - The Calizo Project*, a provocative Docu-Reality series that reveals the behind the scenes of the world of YouTube and Vloggers, and *The Browser*, a TV format centered on face-to-face interviews triggered by web contentist.



Nadav Palti, President & CEO



The Drop, crime thriller

it just recorded the last season of *This Is Us*, nominated for the Emmy's best drama series, while with **Netflix** is finishing **Marvel's Jessica Jones**'.

'With **MTV** and **Nickelodeon** we are happy to continue working in the new seasons of *Paw Patrol*, *Jordy Shore* and *Ex on the Beach*, and for our friends and clients in Turkey we are working non-stop, now in the second season of *Life Line*, a series that has broken records of tuning in Turkey, and with **Global Agency's Gulperin**'.

Completes Christian: 'We expect new challenges for 2019 and we are very happy and proud to 38 years in the dubbing industry in Latin America'.



Matthew Carpenter, Paola and Christian Barzelatto, during the last NATPE Miami

BOOTH #P-1.F50

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BOOTH #R8.C9

Keshet: leading in entertainment



Kelly Wright, SVP Distribution and New Business

Keshet International has become a key referent in the global content business, part of leading Israeli **Keshet Media Group**, which also owns the country's most watched free to air channel, **Keshet 12**. Apart from its well-known entertainment formats and dramas, the group is also a very active player in the co-production and co-development field.

In Cannes it is launching its brand new reality game show, available as format only.

In the near-future city of **2025**, contestants play a game of strategy where status, options and fate are determined by the social currency they obtain. Produced by **Crackit Productions** (UK), **The Great Gardening Challenge** (6x'45) is a factual entertainment shows: Britain's best professional garden designers are pitted against each other in a competition that takes unloved spaces and transforms the lives of truly deserving recipients.

From **Flicker Productions** **Prison Girls: Life Inside** (4x'45) is a factual series that unlocks real stories while exploring the impact of time in prison on female inmates, this bold series delivers a stark and truthful insight into this uniquely pressurized environment.

Following with factual, at **River Hunters** (8x'45) the presenter Rick Edwards and expert river detectorist Beau Ouimette visit some of the most historically significant sites across Britain to search for archaeological treasures underwater;

it is produced by **Hello Halo**.

Last but not least, the game show format produced by **Tuesday's Child: The Hit List** (60') where three couples compete for a chance to win the grand prize in this addictive and engaging music game show where you can't help but play and sing along.



2025, brand new reality show

Caja de Ruidos: expansion in all sense

Argentine dubbing house **Caja de Ruidos** is going through a fascinating expansion: on the one hand, it has enlarged its space with eight new dubbing studios in Buenos Aires, and on the other it has sealed an alliance with **Round Table**, a leading software and IT localization company from Brazil.

'Now, together with **RT** we can offer a range of localization services for all the production phases of audiovisual content for any market', underlines **Ezequiel Lachman**, CEO. 'It is a good moment for us and we continue to look for new directions with the aim of serving more customers



Caja de Ruidos inaugurated 8 new studios in Buenos Aires

Get wild with ORF

ORF Enterprises, the distribution arm of the powerful Austrian public broadcaster, launches at MIPTV a strong catalogue of nature, history and music documentaries, as well as its always long-standing drama productions.

Heading the slate are the nature titles like **Greece – The Wild Side** (2x'52), about this Mediterranean land of unique contrasts; **Cuba's Wild Revolution** ('52), about the largest island of the Caribbean; and **Wild Austria – Created by Water** ('52) that shows the country's Alpine glaciers, ancient seas and mighty rivers.

On the history side, **Passion and Power – Queen Victoria's Secrets** ('52) looks behind the clichés and court propaganda to reveal who she really was; and **Beauty and Despair – Austria's Empress Sisi** ('52) that narrates the life of perhaps the most unusual empress of the 19th century. Music documentaries include **The Csárdás Princess** ('140) and **Carnival of the Musicians – Igudesman & Joo feat. Vienna Symphonics** ('86) that takes viewers on a stormy journey through all imaginable genres.

Last but not least, the fiction series: **Walking on Sunshine** (10x'45), a drama series set in the weather department of the Austrian Public Broadcaster and is about the people who forecast the weather; **Suburbia – Women on the Edge** (30x'48), where five women, whose biggest challenge so far has been surviving their daily shopping tours, are taken by complete surprise when suddenly one of them is divorced; and **Fast Forward** (60x'45) where a woman in her mid-thirties, a divorced single mother, is a successful investigator at Vienna's criminal investigation department.



Marion Camus-Oberdorfer, Head of Content Sales International



Greece – The Wild Side (© Wega-Film/Catkin-Media)

within the audiovisual market globally'.

Caja de Ruidos now has more regional presence and the necessary flexibility to accommodate the client: 'We can dub in Argentina, Brazil, or do it combined with some of our regional partners in Chile and Venezuela', he remarks.

The company is dubbing more series and dramatic contents from Turkey and other markets that seek to penetrate Latin America. Now he has the focus on a new genre: anime. 'We want to grow in anime and our Brazilian partners will be fundamental to exploit this genre in one of the most important markets in the region', concludes **Lachman**.



Ezequiel Lachman, CEO

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Malvinas

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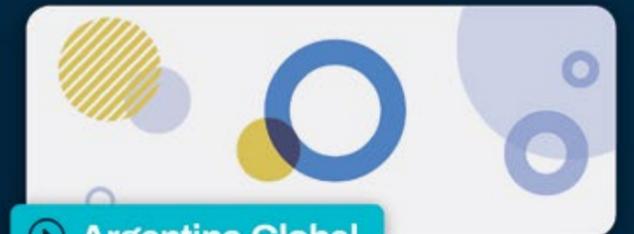
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TV France: opportunities are everywhere



Hervé Michel, president

TV France International arrives at MIPTV once again with one of the largest booth of the fair, redecorated with the national colors and expecting around 40 French companies and 60 professionals. Besides,

‘As usual, our yearly highlight will be Le Rendez-Vous where around 70 French companies gather in Biarritz next

September to meet up with roughly 270+ buyers from 49 different countries, according to last year figures’, explains **Hervé Michel**, president.

‘We are also monitoring an international database with Int'l company profiles, country profiles and something like 12,000 international professionals which is a unique tool for our exporting members’.

Other service is **ScreenOpsis**, a digital platform that gathers 25,000 French TV programs and 15,000 videos in different languages, dubbed or subtitled, enabling members to introduce their programs internationally and allowing registered buyers from all around the world.

‘The moment of French industry is a fascinating one: Fiction drama is the new increasing trend in the French production industry. ‘Last year, we enjoyed a 28% increase in results for our fiction drama sales worldwide. We are now working hard to set the documentary and the format sectors of production on the same trend’, adds Michel.



‘The OTT technology and the platform expansion, opens so many new windows and opportunities for any creative TV programs coming from anywhere in the world. The time when a TV broadcaster in any country could be the only one to decide what to show and when to screen to its public is over. Now the TV viewer is the one making his own choice. Therefore, the circulation of images, contents, is greater than ever and the opportunities are everywhere’, he completes.



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Gaumont: more coproductions

Gaumont (France) arrives to MIPTV with great news: by one hand, the company is in production on season five of its flagship series *Narcos* (50x60’), which the linear rights to all five seasons available in Cannes.

The real-life rise to global power and wealth stories of the world’s most infamous drug lords are addicting and fascinating to audiences everywhere. The first three seasons chronicle the rise of the cocaine trade in Colombia and the gripping stories of the drug kingpins of the late ‘80s, including the infamous Pablo Escobar portrayed by the Wagner Moura. In the latest season, the focus switches to Mexico’s cannabis trade and the rise of the Guadalajara Cartel. Although in a new location, the storytelling, production values and equally talented new cast continue to captivate.

By the other side, the company confirmed its first coproduction with Latin America for **Amazon** and led by **Ezequiel Olzanski**, VP Latin America: *El Pesidente*, with Pablo and Juan de Dios Larrain’s Fabula. ‘Co-productions are key to our growth strategy and we’re looking forward to commencing principal photography on our first Latin American co-pro. The series explores the sports scandal that rocked the world through the story of a small-time Chilean football club president who rose from obscurity to become a key player in a \$150MM bribery conspiracy. We anticipate announcing additional co-productions this year’, describes **Vanessa Shapiro**, President of Worldwide TV Distribution and Co-Productions.

Other highlights for this season are *Murder in Lisieux* (90’), a tense thriller produced for France 3, and *The Art of Crime*, series that has recently been greenlit for a third season, and we are now offering 16x60’.



Vanessa Shapiro, President of Worldwide TV Distribution and Co-Productions



Narcos

MISTCO: three new dramas



Ayzegul Tuzun, VP marketing & sales, MISTCO

MISTCO launches three brand new drama series at MIPTV. **Ayzegul Tuzun**, VP marketing & sales: ‘Following the international success of *Hold My Hand* we believe that these new projects will reach new territories as well’.

‘With that launch, **TRT/MISTCO** begun to open up new territories and partner up with new broadcasters. Not only on linear TV but also with respect to the online platforms. So, our goal for this year will be keeping this momentum of doing more business and accelerating the penetration of the best dramas into the world’, she adds.

First of these new dramas is named *The Circle* and it is the story of two brave young men in a dark world. Cihangir and Kaan are dragged into a game created by the mafia and they also find themselves in love all of a sudden. Aired on January 15th on **TRT1**, the series made a very successful debut.

Second series we launch is named *Beloved* and it focuses on the love story between Aziz and Feride who are the children of two big enemies; it debuted on January 7th on **TRT1**, the series received great feedback from the Turkish audience. And the third series is *One For All*, and it is based on a true story of an ice hockey coach and his team who starts everything in a small town and wins the European Championship.

Regarding international sales, **Tuzun** comments: ‘Our main recent deals are inked for CIS region and Balkans. Russia, Macedonia, Kosovo, Uzbekistan, Croatia, Albania and Poland are the most active territories for us. These new deals cover many separate titles such as *Hold My Hand*, *Resurrection: Ertugrul*, *The Prisoner of Love* alongside with some of our library titles’.



The Circle, brand new dramas

‘Our aim for 2019 is to increase the success of our series throughout the world. There is a big opportunity on **TRT** in regard to drama production, although they continue producing the best historical dramas, recently, they’ve started to invest in modern time dramas’, concludes the executive.

The long-awaited return: Paramount

With more than 100 years, **Paramount Pictures** is one of the most traditional studios in Hollywood and home to some of the most important feature films in the history of cinema. The studio is back again, and stronger than ever combining cinematic blockbusters with series and new contents, adapting to the times.



Dan Cohen, President, Worldwide Home Entertainment & TV Distribution

‘We are focused on scripted with an emphasis on projects that have international appeal. Our catalogue features high quality dramas led by 6-episode series *Catch-22*, *The Great*, *Looking for Alaska* (all them for **Hulu**), as well as comedies *Emily in Paris* (**Paramount Network**) and *PEN15* (**Hulu**)’, initiates **Dan Cohen**, President, Worldwide Home Entertainment & TV Distribution.

George Clooney’s *Catch-22* is premiering on May 17; *The Great* with **Elle Fanning** and **Nicholas Hoult** is a period drama, and in *Looking for Alaska* (8x’60) a young boy meets a beautiful and troubled girl who captivates him. Niche web TV comedy *PEN15* follows best friends in real life, coproduced by **Erskine, Konkle, Andy Samberg, Awesomeness TV** and **Odernkirk Provesiero Entertainment**.

Lastly, *Emily In Paris* is about a driven 20-something American woman from the Midwest, who moves to Paris for an unexpected job opportunity. And the next **Hulu** projects *The Devil in the White City*, produced by **Martin Scorsese** and **Leonardo Di Caprio**, and *The Vampire Chronicles*, based on **Anne Rice**’s series of novels about a French nobleman turned into a vampire in the 18th century.

‘We are a major film studio with 15-18 new theatrical releases a year including the *Mission Impossible* franchise or *Transformer*, but we’re also a boutique TV producer focused on a more exclusive, limited slate including high quality premium content that will cut through the clutter in the saturated marketplace’, adds **Cohen**.



The Great with Elle Fanning and Nicholas Hoult

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Comarex: more original



Marcel Vinay Jr., CEO

Comarex (USA) keeps growing not only as one of the main distribution companies from Latin America, but now also as well on the production side, betting strong on coproductions through its new division **QC Studios**, a joint venture with **Quarry Studios** led by **Veronica Alvarez**, VP Development and Production.

From the production and development side, the company is working on two new series already in development, and another 10 fiction projects to arrive, expecting to generate between three and four new projects per year.

On distribution, Comarex brings to MIPTV the new series from **Imagen TV** (Mexico), like *La Taxista*, a story of endearing love about a popular woman, who struggles to raise her family and especially her disabled daughter.

From **Canal 13 Chile** are *La reina de Franklin*, series that revolves around a prosperous neighborhood businesswoman, which gives off much happiness and union among those who work with her. However, his business is broken by a real estate threat by his ex-mother-in-law, and *Pacto de sangre*, where tragedy will change the destinies of a group of friends forever. While from **Canal Once Mexico** are *Malinche*, series narrated in native languages such as Totonac, Popoluca, Maya and Nahuatl; *Niñas Promedio*, where the sexual practices of three teenage girls are mechanisms to achieve their goals, and *Guardia García*, where the most recognized forensic detective in the country has spent thirty years solving the most brutal cases of homicide and catching the worst serial killers.



Pacto de Sangre, teleseries produced by Canal 13 Chile

W Studios: giros de negocio

W Studios sigue firme en su gran momento de producciones prime time para **Televisa** y **Univisión**. De hecho, la nueva etapa de **Televisa** que se lanzó en Natpe Miami tuvo como uno de sus productos bandera *Amar a muerte*, que es producida por **W**. Y se viene *El último Dragón*, que patea el tablero. La novedad estratégica, en tanto, es que la productora incursiona en nuevos frentes: plataformas cortas de 8-10 episodios y formatos de entretenimiento. Ha establecido un hub de producción en República Dominicana para *MasterChef*, con ya 3 temporadas confirmadas.

Señalan **Carlos Bardasano**, presidente, y **Mario Villani**, VP operaciones & strategy: 'Se puede decir sin dudas que este es el mejor momento de la empresa. Tras los éxitos grandes de *La Piloto 1 y 2*, seguimos al tope y superándonos. Lo viene debe ser no sólo con producciones más grandes aún, sino también con nuevas evoluciones de negocio. Por eso estamos viendo lo de las series cortas y el hub en Dominicana'.

all3media: *The Bad Seed*

Produced by **South Pacific Pictures** (*Brokenwood*) and **Jump Film & TV**, *The Bad Seed* is the next hit from **all3media international**.

Starring Matt Minto and Dean O'Gorman, this contemporary thriller series based on the novel by award-winning New Zealand author, Charlotte Grimshaw tells the story of two brothers from the same dysfunctional family who have raised themselves up from the desperate days of their early childhood, only to have their newly ordered lives begin to fall apart when one becomes a suspect in a murder.

The team at South Pacific Pictures wanted to bring the books to the screen as they believed Charlotte Grimshaw had created a beautifully complex world with strong characters which perfectly lent themselves to a thriller series. The series was shot mostly on location in and around New Zealand's largest city, Auckland. They were capturing a range of worlds from the very rich to the very poor this choice allowed for showcasing of a range of looks across the series.

There is a diverse cast made up of a combination of well-known and up-and-coming New Zealand actors. The series includes strong female characters which Executive Producer Kelly Martin felt was important, these factors add a depth to the world they have created. The cast, the location and the books that the series is based on effectively represents New Zealand as a country.

As a short run series, it lends itself to a thriller or procedural timeslot on screen and it has been written in a way that allows the opportunity to create a second series.



Maartje Horchner, EVP Content



The Bad Seed, new drama



El nutrido equipo de W Studios en Natpe: Carlos Bardasano, María Fernanda Bateman, VP producción, Tania Kunen, VP head of business, Mario Villani

'Vale destacar que no estamos atados a nada, podemos generar proyectos de coproducción con empresas de todo el mundo. E incluso, por nuestra llegada a players líderes, podemos representar una muy buena oportunidad para proyectos cross regiones con varios partners. En esto estamos, explorando todo tipo de vetas, como crecer en Europa'.

Igual, hoy los cañones están puestos en *El último dragón*, la nueva serie de **Arturo Pérez Reverte**, el creador de *La Reina del Sur*, que vuelve con una superproducción filmada en ocho países, incluyendo USA, México, España y Japón. 'Es la serie más cara que hemos hecho, y sigue las historias narco, pero con una muy buena vuelta de tuerca', completan.

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BOOTH # P-1 M51

Club Media: unique digital experiences

With operations running in Argentina, Chile, Paraguay, Peru, Mexico and Colombia, **Club Media** consolidates its positioning as provider of communication solutions for brands trying to successfully reach 'centennials', thru a variety of products that continue to secure annual advertising deals throughout the region.



Beauty Experience

'We are where they are' is the company slogan and daily mission and it has forever been the main drive for professionals at Club Media, who come from a strong background in the creation of original audiovisual projects for children, tween and teen audiences.

And this was no exception when creating Club Media 'We focus on their behavior, their entertainment habits and codes, and we work to come out with projects that speak that language, no matter the platform', said **Solveig Madsen**, Co-Founder at Club Media. 'All of our projects articulate several platforms, depending on the relevant format, to finally create an optimized digital universe for our clients. We focus on digital because that is where our target audience lives. Also, millennials are the new adults; and children and 'centennials' will be the future adults and the way they consume entertainment is already governed by current digital platforms codes. They may change, move, and even new ones may appear, however habit is here to stay. Every experience we create off-line is an excuse to create an on-line platform for brands to successfully reach these audiences', she added.

Club Media has become a solution in a constantly changing ecosystem, where brands trying to reach these audiences are not certain on how to invest efficiently. 'Our clients now understand the importance of keeping a constant online presence and not rely in one-shot experiences that are neither efficient, nor cost effective', she adds. This approach has helped Club Media secure annual deals with brands throughout the whole Latin American region and the media company now manages greater advertising budgets than Pay TV signals in the segment.

The company's content platform includes Club Media Fest, the most important digital artists festival in the Spanish-speaking world, which after 19 editions in Latin America, continues to tour the region, adding new countries; *Goals*, a gaming on-line project that concludes in a main live event; *Beauty Experience*, a 'boutique' live experience combining the worlds of fashion, fitness and lifestyle; *Cruce de Campeones*, a freestyle league touring internationally; *Club Media Music*, the new division working in talent management, booking, publishing and distribution.



The Gaming Cave

In addition, the company is currently working on consolidating strong original content programming across platforms, with new fictional formats as well as news verticals.

The Original Sin of Calinos

Calinos Entertainment (Turkey) comes to MIPTV with the new drama *Original Sin*, commissioned to Romania, and around a man that has been a widow for over 12 years and had never thought of changing his life or remarrying. He is raising his two children (Ana and Petru) in peace and quiet with the help of his relatives and employees. Many years ago Tudor took in his nephew Alex to live with them after he loses his parents in a car accident.



Firat Gulgen, Chairman

Forbidden Fruit follows the story of two sisters who are very close but have very different characters and life goals. Zeynep is a girl who complies to her ethical values, aims to have a successful career and strives for it; while Yıldız believes that she deserves more and considers happiness to be a marriage with a rich man that would save her from her low-income life. While *Our Story* is a drama that resolves around a woman that has been struggling to survive in one of the poorest neighborhoods in Istanbul.

Lastly, the company pushes *Woman*, the story of a young woman living alone with her two children. Being abandoned by her mother when she was eight years old, she later suffers deeply again when she loses her grandparents too. Just when she thinks she is all alone in the world she met the love of her life. Nevertheless, one day he unexpectedly dies and Bahar is once again alone, now spending her days struggling for survival but nonetheless full of determination to raise her children well, holding on to the happy memories of her beloved husband, up until the sudden appearance of her mother and extremely eclectic sisters, opening a door to unexpected events.



Original Sin, new drama

BOOTH # R7.E2

CBSSI: reboots and dramas

CBS Studios International launches at MIPTV its new drama *Blood & Treasure* (13x60'), which centers on a brilliant antiquities expert and a cunning art thief who team up to catch a ruthless terrorist who funds his attacks through stolen treasure. *The Twilight Zone* (10x60') is a reboot of the original science fiction series, while at *The Code* (13x60) the military's brightest minds take on US toughest challenges.



Armando Nuñez, President and CEO, Global Distribution Group

Lastly are the comedy *FAM*, starring Nina Dobrev and Tone Bell in a series about a woman whose vision of a perfect life with her adoring fiancé and his wonderful parents is radically altered when her 16-year old half-sister unexpectedly comes to live with her, and *Charmed*, fierce, funny and feminist reboot of the original series.

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BOOTH #R8.E17

The Kitchen, worldwide



Deeny Kaplan, VP

The Kitchen Worldwide, and its 12 global language studios, arrives to MIPTV with a big amount of demos in all languages for direct on the floor sales at the Palais.

'With MIPTV set, distributors, networks, broadcast stations and producers have already begun preparing their new programs. Clearly, these demos have proven to be a most effective sales

tool. Being able to view your content in the languages of the targeted markets is a great advantage for all', describes **Deeny Kaplan**, VP, and highlights the importance of the expansion of the company towards new territories, always acquiring and adopting themselves to the main characteristics, laws and cultures of each market.

'Whether a :30 promo, or teaser, or an entire episode of an animated cartoon, live action series, or a novela, The Kitchen's MIPTV demos have been a mainstay of the convention for nearly 18 years', she remarks.

The Kitchen Worldwide locations are in: France; Moldova; Russia; Germany; Italy; Spain; Hungary; Turkey; The Netherlands; Brazil; Mexico and the US. These countries represent some of the most popular languages for content distribution around the world. 'With this much diversity, we are able to provide our clients with the ability to truly showcase all they have to offer, whether from a laptop, iPhone, or on a monitor,' **Yoram Chertok**, Managing Director of The Kitchen EMEA explained. 'We are always delighted to be a part of our clients' success from the very beginning.'

One of the last offices to be opened was The Kitchen Italy, with base in Milan and supported by **Carlo Forester**, a co-founder of **Jinglebell Communication**.

Carlo Forester: 'The principals of The Kitchen International share a similar view of where we are headed as an industry as a whole and I look forward to working with the entire Kitchen team as we continue to grow.'

Mediabiz: 'Everyone should co-produce'

It is clear that co-productions is already a model installed in Latin America and is being integrated with Europe. This allows more ambitious projects to be produced and at the same time provides more content to the OTT platforms and channels, since they can distribute their budgets in several productions.

The challenge now is for everyone to participate in the benefits of co-production. Currently, the agents and / or production houses present their ideas and projects to one or several channels looking for the interest to develop it and then produce it. Normally it is a channel / OTT that takes the post and seeks, after investing in the development, adding to other means, distributing windows and deadlines. The point is that today are the

Global Agency: content that creates buzz

Independent TV content distributor **Global Agency** (Turkey) offers at MIPTV a broad portfolio of powerful dramas and innovative formats that continue to capture the imagination of audiences across the world.

Izzet Pinto, CEO, describes: 'Putting customers first, our dedicated team blends top quality and original content with a dynamic marketing approach. Growing quickly to encompass more than 150 projects, Global Agency has enjoyed international hits with hard-hitting dramas such as *1001 Nights*, *Magnificent Century*, *Broken Pieces* and *Mother*. Our executives attend more than 15 major entertainment content market events annually to reinforce our worldwide reach. With our powerful programs, trendsetting formats and innovative strategies, Global Agency is well placed to keep providing content that creates buzz'.

Among the main shows for this season Pinto recommends *Sisters*, where love and betrayal drive sisters apart; *Gulperi*, which follows a woman that struggles to fulfill her dreams in the face of a tyrannical family determined to control her every step, battling alone to win the hearts of children turned against her and carve out the loving life she craves, and *Evermore* is the story of a passionate love between a wealthy businessman and a poor singer.

From the format slate, the company brings *Upgrade*, a fresh, new reality game show that comes into the viewers' homes and offers them the chance to upgrade their old household items by answering trivia questions. And *The Villa: Battle Of The Couples*, where 8 famous couples will compete in tasks that will allow the best couple to keep their jackpots intact, as for the less strong couple, they will have to do everything to protect their jackpots and their dreams.

Lastly are *Auction Queens*, where expert also gives advice to the viewers to maintain, repair or customize certain items, the cooking show *Momsters*.



Izzet Pinto, CEO



Evermore, Season 2



Alex Lagomarsino, CEO Mediabiz

producing houses who make the greatest effort, should carry out the production of the series, being responsible for making it within the agreed parameters. Something that, who we have produced, we know is an art, given by the innumerable amount of variables that we can handle and the imponderables that we can't.

The production houses receive their production fee in exchange, which will depend on their negotiation capacity and their route.



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The Philippines shows its evolution

The Philippines has become a key APAC territory in the content business. Its local players, ABS-CBN, GMA and TV5 describe in this report the big evolution of this market within the last decade

The Philippines has been showing strong activity in the international markets through two of its largest entertainment groups, **ABS-CBN** and **GMA**, looking for content from the world for its local networks and medias.

They were a big buyer of scripted formats (mainly from Latin America, but also Korea, etc.) that then become local successes, and global hits. From that “buyer territory” to this new global producer, many things have happened. Now, apart from selling, the country aims to build alliances and partnerships to keep strengthening its position as one of APAC top drama provider.

At the local scenario, the new technologies have allowed these conglomerates to evolve in their contents and platforms offering. New channels have been launched, as well as new streaming, pay and free, services. The increasing number of original production, is permitting the Filipino content to gain position in the global marketplace.

Media

The Philippines is a unique country in many aspects. Geographically it is composed of some 7,600 islands inhabited by more than

100 million people, where 70% are D and E classes. More than 10 ethnic groups coexist in the country, being the most important ones the Visayan and Tagalog.

Its economy is showing strength with an average growth rate of 6% every year of the last 4-4. But in this 100 million-people country only 10% are capable of being financed. It is the 34th largest in the world, with an estimated 2018 GDP (nominal) of USD 371.8 billion. Traditionally an agriculture-based economy, the country has been transitioning to one with more emphasis upon services and manufacturing.

Filipino and English are the official language, and in term of media, there is a strong focus on the Western entertainment, which concentrates 70% of the theatrical box office. Moreover, it is one of the territories in the APAC region in which **Netflix** shows better results. TV rules the landscape, notwithstanding mobile, which is gaining ground due to faster and more affordable data services.

According to Kantar Media, daily TV viewership is around 96.6% increasing from 91.2% back in 2014. Time spent watching TV also rose to 3.7 hours from 3.4 hours during the same period. TV is mainly consumed at home

on a “TV device” (93%), “On PC” (52%) and “On mobile device” (50%). It is also important the consumption “At movie theatre” (48%), according to Statista (2017).

Pay TV is an important segment of business with cable and DTHs controlling the market: 30% of the service penetration after 27 years of operation. “The lower income sectors are still watching Pay TV through DTH, and we don’t see any cord-cutter in that segment, on the contrary a stable growth is being noticed. Where the cord-cutter is bigger in on cable. We are not sure if they are migrating to OTT, but the number has been going down. Anyway, the back of the profits in The Philippines continues to be advertising, not subscriptions”, explains **Carlo Katigbak**, CEO and President of **ABS-CBN Corporation**.

The company is Philippines’ largest media conglomerate in terms revenue, incomes, assets and market share. **ABS-CBN** is primarily involved in TV (**Channel 2**, **ABS-CBN News Channel**, **ABS-CBN Sports+Action**) and radio, but it also owns leading cinema and music production/distribution outfits, the largest cable TV service provider, **Sky Cable**, **ABS-CBN Mobile** and **ABS-CBN Digital Media**, including OTT **iWant**, with more than 1 million apps downloads on the launching day (November 2018).

Moreover, the group is the pioneer of DTT in the country. As of February 2019, **ABS-CBN TVplus**, a DTT device, already sold 7 million boxes since its launch in 2015. Its PPV channel **KBO** reached 1.2 million unique customers. The DTT service continues to expand its signal coverage areas as part of its mission to lead the Philippines’ migration from analog to digital broadcast by 2023.

Philippines has shown a terrific growth in social media, especially **YouTube** and **Facebook**: ‘YouTube is a substantial source of eyeballs and revenues. **ABS-CBN** is among the Top 25th content provider in the world in this platform in terms of growth, traffic and revenues. We are happy to be part of them, but we see them as complementary. Their strength is to distribute ’20 or less content, but the



Carlo Katigbak, CEO and President of ABS-CBN



Felipe L. Gozon, Chairman of the Board of Directors and Chief Executive Officer of GMA Network, Inc



Vincent Reyes, CEO, TV5

premium experience is in our own platforms: digital original, full episodes, full seasons. We use YouTube to promote that experience in our platforms’, he adds.

By the end of 2018, **ABS-CBN** unveiled two Hollywood-caliber sound stages in San Jose del Monte City, Bulacan, as part of 65th year of TV celebrations. In parallel with the construction, production and support teams began a 3-year training program for the stages both in Hollywood and in the Philippines, designed by **Manhattan Beach Studios**, **ABS-CBN Studios** and **ABS-CBN University**. Following the intensive training camp, the studios are hosting the productions of upcoming teleseries *The Faithful Wife* and the much-anticipated *Darna* film on 2Q.

Primarily involved in TV and radio, but with subsidiaries in various media related, **GMA** is the other largest player in The Philippines. It operates the TV networks **GMA Network-Channel 7** and **GMA News TV**, radio stations, three international channels, film and TV production and distribution companies, music, talent management and new media.

One of Philippines’ leading media giant is investing almost USD 20 million to complete the second phase of its digitization project which involves the production, post-production, content management and distribution of its programs.

The Group is about to complete the upgrade of its Electronic Field Production capabilities to further improve its HD image capture to Full 2K/4K HD, elevating the output to global standards. In line with this, the requisite enhancements to the Network’s Media Asset Management and Broadcast Automation Systems have already been completed. **GMA Network’s** ongoing digitization project will bring its world-class content to viewers across the globe.

The digitization project will start commissioning the Digital Terrestrial Transmitters that now provide superior digital TV signal reach, enabling the viewership of **GMA** programs through digital-enabled TV sets and set-top boxes in various areas in the

country, including Mega Manila, North Central Luzon, Cebu, and Davao.

Post Production is likewise implementing full equipment and software upgrades coupled with increased storage and color grading capabilities to optimally process high-end 2K and 4K HD formats. **GMA’s** Field News Gathering capabilities are being upgraded to enable the transmission and delivery of HD-captured remote live events to **GMA Network’s** Technical Operations Center as they happen.

Parallel to upgrading the media asset management system is the commissioning of a new News Automation System (NAS) designed to provide the country’s most trusted news organization with even greater speed and agility in bringing viewers up-to-date news and information.

‘All these state-of-the-art upgrades are part of our ongoing digitization project to bring world-class programming to our viewers here and abroad. We are excited to unveil more innovative offerings that will not only maintain our position as the country’s leading broadcast network but will also revolutionize TV viewing experience in the Philippines’, remarks **Felipe L. Gozon**, Chairman and CEO.

The third largest network is **TV5**, a sport-based media company offering all kind of sports, but with special focus in basketball. Owned by the largest Filipino telco **PLDT**, the company has 10 years, gathering close to 5-7% of the national share. Its aim is to differentiate by offering content that it is not available on them.



Descendants of the Sun – The Philippine Adaptation, is one of the strongest drama releases from GMA, also available for worldwide distribution

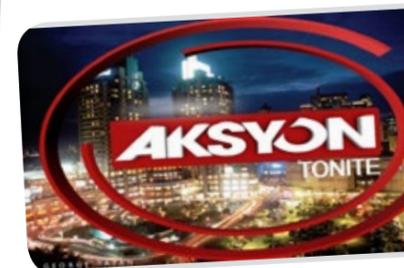
Vincent Reyes, CEO: ‘Sports is taking 4% of the ad pie in our country and 8% in the APAC region. It is a key asset of our programming, and we deliver it in different formats: documentaries, news, entertainment and, most recently, eSports, a big global trend that shows consistent growth in The Philippines’.

The company has a partnership with **ESPN**, which has allowed offering the best content of the world plus the most popular local events. On TV, it operates a VHF and a UHF channel that program, as well as 5+, a 24hs sports channel for the younger generations including eSports and *X Games*. ‘25% of our programs are news, entertainment and lifestyle/cooking related to sports and competitions’.

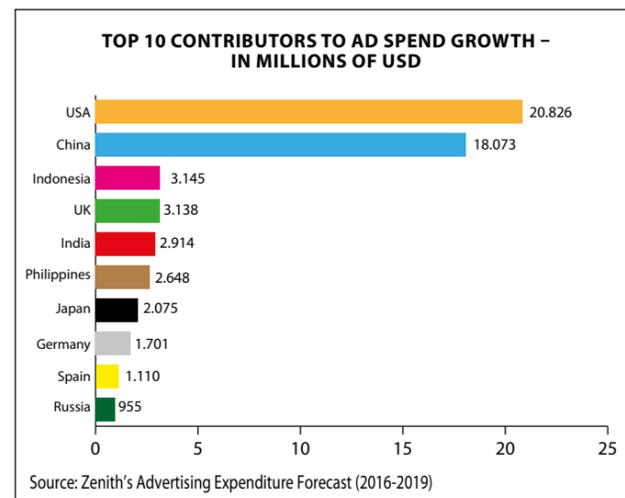
It also manages **TV5.com** and **ESPN5.com**, the #1 web sport in the market. ‘We produce content related to sports, and we have some unscripted shows and cover big sports events such as Asean Games or Olympic Games’, says **Reyes**.

He adds: ‘Philippines is maybe the global capital of social media. We are a FTA channel, and we did some experiments with the last tournament of the National Basketball League with a simulcast in our platform and **YouTube**, and we found that we didn’t cannibalize the content, they complemented’.

Reyes concludes about eSports, which us a “big thing” in The Philippines: ‘The next year we’ll be broadcasting the very first edition of a professional competition in our country. While traditional TV goes to the mainstream segments, offering drama and big entertainment shows, we need to offer something else. There are better opportunities to growth’.



Aksyon Tonite is TV5's flagship prime time news



The General's Daughter is one of ABS-CBN biggest prime time drama of this season with 32.8% share



CJ E&M adapts to the new media landscape

'Our last TV season has been successful, building four strong drama blocks throughout the week. Recently we have licensed to Netflix *Memories of the Alhambra*, which dealt with Augmented Reality games and came to an end with successful ratings and feedback globally'.

Jangho Seo, General Manager, Global Content Division of **CJ E&M** describes the good moment of this key group in the Korean market, and abroad as it has also acquired Stockholm-based **Echo Rights**. 'Our traditional channels **tvN** and **OCN** has continued to air interesting dramas including *The Crowned Clown* which was #1 ratings for the Monday-Tuesday prime time block with over 10% viewership', he adds.

Trap was a title on **OCN** which was a new project working with film directors to create TV dramas that has seven episodes named dramatic cinemas. 'It was a new challenge for us, but it ended well and we are looking forward to more of these dramatic cinemas' in the future', says **Seo**.

'On formats, *I Can See Your Voice* is now airing season six on its original channel **mnet**, and we were happy to see it reach its highest rating ever, including all six seasons. Already sold to more than eight territories, we are looking forward to more localization in European countries such as Germany, Italy and the UK, and also in Australia'.

Continuing with dramas, **Seo** notes that as it is in other countries, 'it's not easy to define what type

of content works best in Korea'. In the country, he explains, show trends change 'very quickly', as producers come up with a new show each time, instead of keeping one show for numerous seasons (*I Can See Your Voice* is an exception).

'In terms of volume, the drama market is bigger as we have more slots planned throughout the week', he clarifies. Viewer's trends vary according to how interesting the story/format of the content is rather than genres: 'We are trying our best to see what's new and react correspondingly', he completes.

In Korea, digital is transforming not just our market but also the whole global paradigm. The APAC market has one of the fastest Internet speed digital infrastructures, so the digital market has penetrated us more than anywhere else.

'Global platforms such as **Netflix** have landed and are localizing their contents, where traditional platforms such as **tvING** is already in service. As it is now so easy to watch ready-made content so fast on these digital platforms, the whole demand for content regardless of digital and linear channels is rising', describes **Seo**.

'One change would be that people do not wait to watch the shows on TV on a certain time, but are available to watch at any time of their preference on their device. Plus people are more willing to pay a certain subscription fee now than before, for better video quality'.

About the future, he concludes about the recent acquisition of global distributor **Eccho Rights** (Sweden): 'We are still setting our strategies to work together in the finest way. Our main sales and acquisition strategies will quite remain unchanged. However through working together with them we are anticipating wider global distribution of our scripted and non-scripted formats'.



Jangho Seo, General Manager of Global Content Division



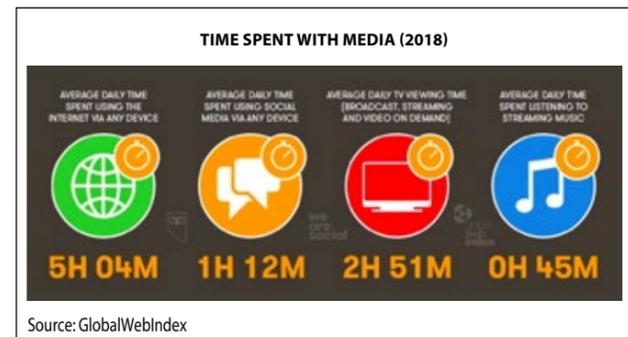
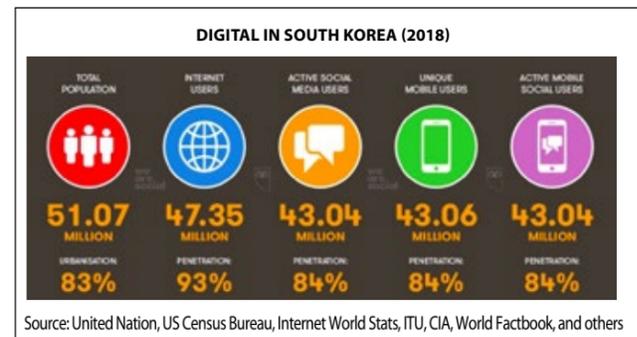
Trap



I Can See Your Voice



The Crowned Clown



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Viacom18, a challenger brand



Sudhanshu Vats, Group CEO & MD, Viacom18

A joint venture of **TV18** (51%) and **Viacom Inc.** (49%), **Viacom18 Media Pvt. Ltd.** is one of the fastest growing entertainment networks and a house of iconic brands in India, whose M&E market is one of the fastest growing worldwide: media consumption grows at almost 9X that of USA and 2X that of China, according to IBEF, Ministry of Commerce and Industry, GoI.

‘Indian M&E market is what I call an ‘And market’ where video content will continue to grow on TV and digital and not at the cost of one another, as there exists headroom for growth for both the platforms. The industry is expected to grow to USD 40 billions by FY23’, underlines to PRENSARIO **Sudhanshu Vats**, Group CEO & MD of **Viacom18**.

‘The broadcast business for us is at an interesting stage with our network being invested in both scripted and non-scripted content. Our flagship brand **Colors** started strong with the fantasy show *Naagin* and the reality show *Dance Deewane* propelling the channel to become the #1 GEC. This was followed by a period of comparative sub-optimal growth before *Bigg Boss* hit the screens. This trend of high performing reality continued to grow with *India’s Got Talent* and *Khatron Ke Khiladi*’.

On kids, it operates **Nickelodeon**, **Sonic**, **Nick HD+** and **Nick Jr.** The company has launched the first original series for **Colors Rishtey**, *Navrangi Re!* (with **BBC Media Action** and **Bill and Melinda Gates Foundation**), a one-of-a-kind satirical drama series with an underlying

behaviour change message on sanitation, and *Khoob Ladi Mardani Jhansi Ki Rani*; and for **MTV**, *Elevator Pitch* and *Ace of Space*. For the upcoming months, it prepares *Rising Star* for **Colors**, *Funny Girls* and *Troll Police 2* for **MTV**, new IPs on **Nickelodeon**, as well as a new slate of films for **Colors Cineplex**.

Four buckets are working better in India: fiction, non-fiction (format shows), event airings and movies. ‘Fiction is the primary, while non-fiction shows are used to bring about a periodic spike in terms of perception, revenue and viewership. Across **Viacom18**, we have achieved success with each of these buckets. Currently, the flavour of the season are format and fantasy fiction shows’, remarks **Vats**.

Regarding digital, he portrays: ‘Synergy between Linear TV and OTT happens at three levels: first, catchup: all our broadcast content is available on **VOOT**; second, content around content: we create entire digital ecosystems (behind the scenes, extended character tracks, interactivity pieces); third, a transition: we look at interoperability between the broadcast and digital platforms for a show’s lifecycle’.

Vats exemplifies: ‘We have moved the continuity of entire series or brought in next seasons of what were first TV shows as **VOOT** Originals. Two seasons of *Kaisi Yeh Yaariyaan* were aired on **MTV** and we launched *S3* as a **VOOT Original** performing very well with over 30 million views. For one of a **Colors** show, *Silsila...Badalte Rishton Ka*, basis viewership numbers across TV and digital we decided to carry on with the show exclusively on **VOOT** even after it stopped on broadcast. The digital run of *S1* fuelled by fandom saw huge numbers thereby leading to an entirely new *S2* exclusively on **VOOT**’.

‘The biggest impact looks to be disrupting existing business models and distribution systems, which has also enhanced our understanding of our consumers and allowed us to create personalized content viewing experiences for them. This revolution has democratized content to a large extent, forcing traditional creators to look beyond formula and experiment

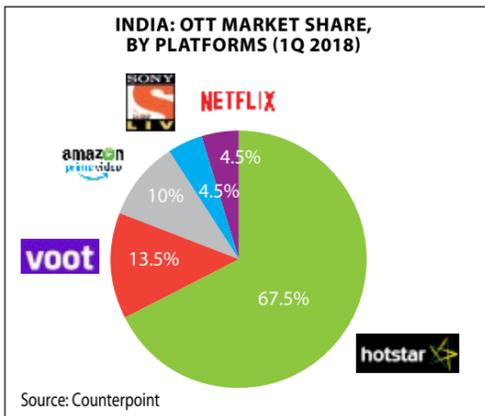


On kids, it has launched the first original series for Colors Rishtey *Navrangi Re!* for which it partnered BBC Media Action and Bill and Melinda Gates Foundation

with concepts and stories that they hadn’t considered before’, says **Vats**, who also informed the new digital productions: the celebrity chat show *Feet Up with the Stars*, two thrillers *The Sawakar Case* and *Asura*: ‘We are also working on over 30 originals across languages’, he completes.

With **Facebook**, **Youtube** and **Instagram** the definition of the M&R industry has changed. ‘For traditional media houses who have been able to adapt to these changes, it has opened up an additional line of business and unlocked revenue potential. Growing at a CAGR of 32%, the Indian digital advertising market is estimated to reach USD 3 billions by 2020. For organizations, it is imperative to have an integrated view of content and its dissemination, as technology powers us to understand viewership preferences and allows us to take business decisions accordingly’.

Future? **Vats** completes: ‘We are currently in the beta phase of **VOOT Kids** and will launch the product in the first quarter of FY’20. With an unparalleled reach to the youth of our country we collaborated with **Nodwin Gaming** to introduce **DreamHack** to India and are looking at increasing our foray into eSports’.



Kaisi Yeh Yaariyaan aired for the first two seasons on MTV and was then launched as a **VOOT Original** for *S3* performing extremely well with over 30 million views

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China: to lead the global format market



Vivian Yin, CEO, Fremantle, China

Fremantle, Syco Entertainment and **Hunan TV** has partnered to co-develop a major new 13-part series for China, based on the globally successful *Got Talent* format franchise. The series will be known locally in China as *Dian Feng Zhi Lu* which translates to *World's Got Talent* and is set to air this month on **Hunan TV**.

This prime time production brings together a number of the world's most talented, memorable and fan-favorite acts from over 30 of the *Got Talent* franchises around the globe. These all-star performers will take to the stage in **Hunan**, China to compete in a massive global competition with the hopes of claiming the ultimate title of China's *World Champion of Got Talent* and an equally impressive winner's grand prize.



Vivian Yin, CEO, **Fremantle**, China, comments: 'Inspired by China's *One Belt One Road* initiative, this production will welcome many exceptional acts who've already featured in many *Got Talents* around the world. It will celebrate the cultural diversity and stories of ordinary people with extraordinary talents together on the world's biggest stage in Changsha, China. We are thrilled that our partners **Hunan TV** and **Syco Entertainment** share the same vision and have made this unique project possible.'



Abi Doyle, VP, International Productions, **Syco**, adds: '*Got Talent* is the biggest TV brand in the world and responsible for discovering incredible international talent. This format has already entertained a global audience of almost a billion and we are delighted to have Hunan TV commission this exciting production with our **Fremantle** partners, which will showcase a variety of Chinese acts as well as the very best of our *Got Talent* global family'.



Lester Hu, Head of Formats and International Business, **Hunan TV** concludes: 'As China's leading content producer and broadcaster, we've always been looking for big ideas with global influence. What **Hunan TV** is really after is co-developing original content with our partners by engaging global creative into local market at the very beginning of the development process. We are excited about hosting this massive television event that promotes intercultural communication and appreciation. Combined with our in-house production expertise, we trust that *Dian Feng Zhi Lu* will make a splash in both local and international markets'.

The *Got Talent* format was created by **Simon Cowell** and is co-owned by **Syco Entertainment** and **Fremantle**. It is the world's most successful reality TV format watched by an estimated 900 million people worldwide. There are 71 local versions across Europe, Asia Pacific, the Middle-East, Africa and the Americas.



JKN reinforces and expands Bflix

JKN Media's exclusive soon-to-be-launched digital channel on its OTT platform **Bflix**, meant for Thai viewers later this year, has partnered with **IndiaCast Media Distribution**, the domestic and international distribution arm of **Viacom18** and **TV18** to bring content from the network's Indian repository. Dubbed in Thai, **Bflix** will be available in Thailand and key Southeast Asia markets.



IndiaCast Group CEO, Anuj Gandhi, with Anne Jakrajutatip, CEO of JKN

Both companies together have successfully syndicated shows from **COLORS** for over five years in Thailand. This customized and exclusively packaged digital channel will bring specially curated content from the youngest and fastest growing media and entertainment company in India to the digital savvy viewers in Thailand.

Speaking about the relationship, Group CEO & MD of **Viacom18**, **Sudhanshu Vats**, comments: 'With an increasing number of viewers graduating towards the digital mode of entertainment worldwide, we are continually evaluating our play in the international digital distribution space. This symbiotic partnership with **JKN Media** will further strengthen our equation with the country's viewers who have enjoyed and appreciated our shows from **COLORS** over the years'.

'There are many cultural similarities between India and Thailand, and hence the strong resonance with our offerings. This endeavor is another step towards providing seamless and individualized Indian-origin entertainment to Thai viewers', he adds.

JKN constantly strives to partner with brands that share their sensibilities towards great storytelling and the emotions that high-quality content can evoke, according to **Anne Jakrajutatip**, CEO of **JKN**. 'Over the past five years, we have formed a strong association with **IndiaCast**, which has seen us exclusively acquiring almost all the drama series from **COLORS** for Thailand. Shows like *Madhubala*, *Balika Vadhu*, *Chakravarti Ashoka Samrat*, *Chandrakanta*, *Udhan*, *Naagin*, *Shakti*, *Shani*, *Mahakali*, *Ishq Mein Marjawan*, *Bepannah* and many more have been hugely loved by all audiences in Thailand, she stands.

And she concluded: 'I am glad that we have now extended our association through this digital channel which will enable us to distribute all their content on our OTT platform in Thailand and across distribution platforms in Thailand, Taiwan and Hong Kong'.



Balika Vadhu

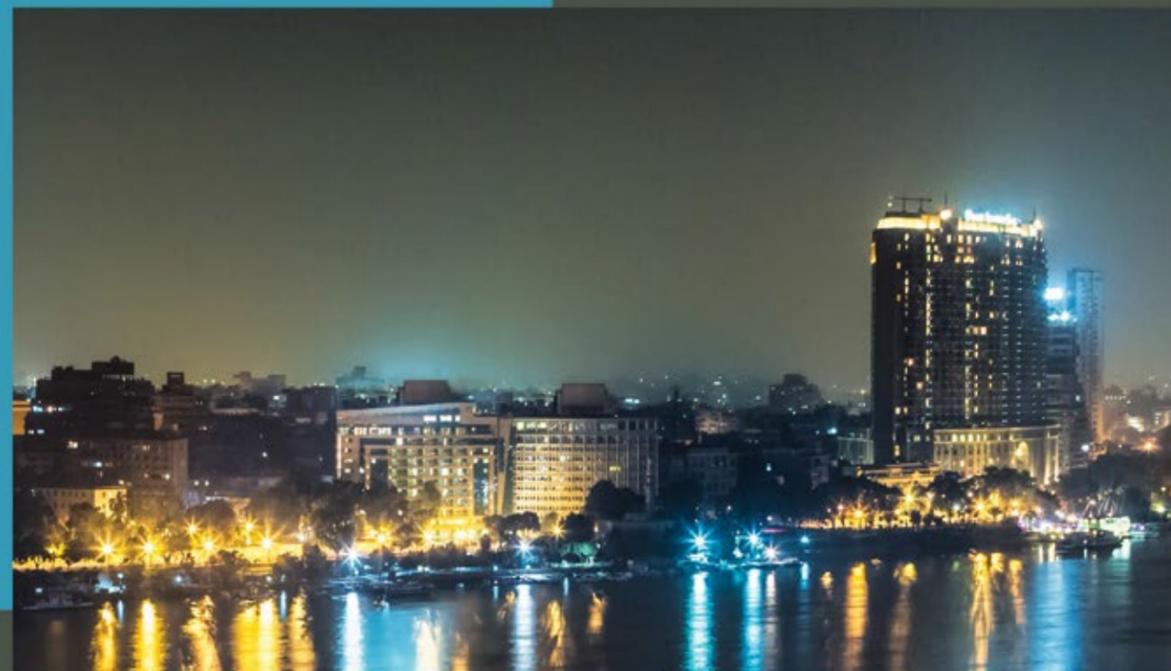


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Basic Lead



ABC, Australia: challenging perceptions



Sally Riley, Head of Scripted

With two digital channels with focus on big shows and the news, a third one with preschool programming during the day and comedy at night, and a free VOD service, on its third channel, Government funded **Australian Broadcasting Corporation (ABC)** is a key player both locally and in the

international sphere, through its distribution arm, ABC Commercial.



Sally Riley, Head of Scripted, describes about the strategy: 'We work on lots of acquisitions and we have a VOD free services, and when we first started it was a catch-up and we have recently commissioned some short form for that. We also have

sixty radio stations, we reach 80% of the population. We do drama, comedy, we have an indigenous department, we do factual, and we make the most children's in Australia'.

'What distinguished us is that our content is Australian, we have to have something Australian in everything, and we make about 40-45 hours of drama each year. I like spiky content that challenges people's perceptions, and I also like shows that have a purpose of changing the world. It's not just about entertaining, but giving something more to the audience'.

But the company also is expanding and gaining presence on other platforms like **Netflix**, where the broadcaster has sold several shows. 'They are great partners, creatively we work well together, but it's getting increasingly harder because of the rights packages that they want, it's difficult for us to give up those rights, it's hard for us to break in the UK market because they make so much content, and most of our stuff is in America, but now is your opportunity to work with me', she adds.

Some example are *Pine Gap*, be a political thriller set in and around the enigmatic U.S./Australian joint defense facility located in central Australia, and *Glitch*, premiered on ABC in 2015 and sold to **Netflix** and set in the fictional country town of Yoorana, Victoria, where seven people return from the dead in perfect health.



Pine Gap, political thriller

And regarding the alliances, Riley remarks: 'Working with the partners is great, but in the part 6-8 they're asking for more stars, and it's hard to get stars to come back to work in Australia, does it shape the content? A little bit, but it gives us scale and we can afford to shoot in the middle of nowhere', she completes.



HOT, Israel: the challenge of second seasons

With close to 872,000 subscribers of multi-channel television (60% of the multi-channel television market share), about 740,000 internet subscribers (+40% of the market share), and about 680,000 fixed telephone lines, **HOT** is one of the largest Telcos in Israel, providing services for a total of approximately 1.3 million households.



Tal Granot-Goldstein, CEO

'We believe in Israeli content. We believe that Israeli content brings something new and exciting to the world', describes its CEO **Tal Granot-Goldstein**, and highlights the importance of cooperation to develop more original content to its subscribers, having alliances with companies like **HBO**,



Fremantle and **Viacom**, with whom they have partnered with to deliver two projects each year.

According to **Mirit Toovi**, Head of Drama Department, this alliances helps the company to compete in a market more and more diverse and competitive than ever before, both in terms of consuming and producing.

Toovi highlights that, now is more difficult to succeed with a story and add more seasons. Why? 'Peak TV parameters have completely changed over the last two years, we all talked about peak TV if you, most of the series won't go into the second season. Since we have so much content, Hebrew and English, we have **Netflix** and Hebrew channels, it's almost impossible to shine with a second season'.

'In Israel you have to remember that the heads of drama don't always have the last word. We also have the showrunners, maybe abroad it's easier to persuade them to do a second season, but in Israel you really need to beg them, there are many reasons not to make a second season. The question is how not to make a second season'.

A good example about this for the executive is related to the end of *Ish Hashuv Meod*, starred by famous actor **Yehuda Levi**: 'We were sure we wouldn't have a second season, but the end was closed, it was a TV event for us, but the showrunner came to us with a brilliant idea. "Let's change the theme". The theme was a superstar VIP - who's trying to live a normal life and fall in love with a normal girl. The second season was taking him overseas and finding out if he can make it as someone. Since the numbers were very successful, that was the reason to make a second season, now we're airing it, it's doing brilliantly, which isn't easy to do, but I think the end is the end'.



Ish Hashuv Meod, series starred by Yehuda Levi on its second season

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Network Ten (Australia): Dam Monaghan, head of programming; Paul Anderson, CEO; Glen Kingey, independent; Beverly McGarvey, CPO; and Danny Mitrovic, programming & content manager, Win Network



Japan: among others, Kana Sasaki, managing director, content, and Noriko Suzuki, sales, YTE; Aya Kohara, buyer, Nippon TV; Ai Karasawa, manager acquisitions, NTVIC; Saki Takahashi, acquisitions, Nippon TV; Akiko Imai, director, NTVIC



Japan digital buyers: Kazufumi Nagasawa, CCO, Hulu, Kantaro Hayashi, content acquisitions manager, and Tetsuo Kkobayashi, content manager, both from U-Next; Kyoko Sekine, senior manager acquisition, Hulu, Kana Mitani, content acquisitions, and Ami Oshima, content section 1, both from U-Next



Buyers from Nippon TV (Japan): Ryosuke Ezura, director at Nichiki, Sayoko Iwasaki, production, and Aya Kohara, acquisitions manager



Lorraine Leach, content and alliances director at Huawei; Trista Chang, from Disney, and Megan Fu, business development, and Sofia Zhang, video coordination director, both at Huawei



Buyers from CJ E&M (South Korea): Jae Hyuk Lee, SVP, global content; Jinwoo Hwang, head of global content development; Deok Jae Lee, president of media content business, and Jaesong Lee, head of global strategy



JTBC, the youngest Korean broadcaster, is looking to develop new strategic alliances: Steven JH Choi, general manager, and Joo, Hyun Tae, manager, corporate strategy development (bordes) together with Anne Lee, Fox Networks Group



Kyoto Kato, deputy GM, and Takayuki Terashima, CEO, Super Network; Ruri Izumikawa, acquisitions, acquisitions, TFC; Azusa Nakamura and C. Otsuki, both acquisitions from WoWow



D'Live, Pay TV and OTT from South Korea: Yong-Ju Jeon, President/CEO, surrounded by Min-jae Seong, executive supervisor, division head, OTT; In-sanx Hwang, EVP corporate support office, and Stella Kim, general manager, E&M strategy



Digital media in South Korea: Gi-Uk Seong, assistant manager, ICT Business Unit, KTH; and Chanyoung Park, manager, content acquisition team, LG Uplus



KBS, Korea: Genma Kim, entertainment producer, Youngsam Kim, KBS World Channel & content producer/deputy director, and Seok Hyeon Kim, channel manager



Asian buyers: Jinguang Zhu, director of creative, Yi Chi, research and acquisitions, and Wang Bo, content acquisitions, all from JSBC China, with Nori Nakano, non scripted formats acquisitions, Nippon TV Japan



ABS-CBN: Carlo Katigbak, president & CEO surrounded by Cecile Sumabat, acquisitions officer, Macie Imperial, VP integrated acquisitions and syndication, and Martin Lopez, chairman



GMA Network, The Philippines: Jose Mari Abacan, First VP, Program manager department, and Beryl Faith Cruz, acquisitions executive



PPTV HD 36, Thailand: Krissada Trishnananda, content acquisition director, and Palakorn Somsuwan, EVP, content & marketing



Chalakorn Panayashom, managing director digital TV, Workpoint Channel 23



Thomas Su, content acquisitions consultant, Bangkok Media Broadcasting, Thailand, Joy Olby-Tan, lead acquisitions, Mediacorp TV Singapore, Surin Krittayaphongphun, Bangkok Media, Thailand



True Vision, Thailand: Attaphon Na Bangsang, managing director, and Nisa Sittasrivong, assistant director



BBC Worldwide: Ryan Shiotani, VP, branded services, and Daphne Kang, director of programming for Asia, and Melanie Rumani, head of acquisitions, UK



Vietnam Television (VTV): Nguyen Thi Kim Dung, chief accountant, finance department, and Do Thin Ngan Hang, Vice Manager, acquisitions and sales



TKL, Vietnam: Ton Nu An Tram, screening manager, Nguyen Thi Truc Mai, managing director, and Le Van, senior programming manager



Hang Meast HDTV, Cambodia: Eng Song Liep, program executive, and Eng Leanghong, content acquisition manager



India: Pradeep Milroy Peter, SVP programming, and Krishnan Kutty, business head, both from the broadcaster Star TV, with Aanchal Maheshwari, senior manager, and Kavita Panda, director licensing, both from Disney Media



Buyers from India: Vivek Srivastava, EVP and head of entertainment at Times Network, Hashim Dsouza, head of content at Viacom18, and Ajit Thakur, head of In-House Studios at Reliance



Zee, India: Ali Zaidi, deputy VP, Zee Telefilms, and Amkur Kapila, Head - Programming & Content Acquisitions, Zee Studio



Indian OTT platforms: Aaron Mascarenhas, acquisitions and licensing, and Mansi Shrivastav, head of acquisitions, Times Internet/MX Player (bordes) with Aditya Ray, executive director, Crest Advantage and Ali Hussein, COO, Eros Now



Jimmy Kim, SVP, content & formats, MNC (Indonesia); Michael Tang, MD, SDI Media Singapore; Iris Wee Soo Lin, chief content & commercial officer, and Shierly Kosasih, head of licensing, both from MNC



Kiki Zulkarnain, GM programming, Deni Yusep, senior market research, and Gunawan Gunawan, acquisition and distribution manager of ANTV Indonesia with Ambica Kuthiala, executive producer, Black Sheep Studios (Singapore)



Triandy Suyatman, program advisor, PT Elshinta Jakarta Televisi, Indonesia



Harsiwi Achmad, director, Indosiar



Indonesian buyers: David Suwanto, deputy director of programming, and Banardi Rachmad, VP, Programming Acquisition, SCTV (bordes) with Devi Noviana, program acquisition department head, RCTI



Asian buyers: James Chang, EVP, and Yi Chang, program acquisitions, both from Tempo International Mass Media Taiwan (bordes), with Ying Zhang, CBS, and Ching Sun, buyer at Sun TV (Hong Kong)



Youku China: Julia Song, head of scripted acquisitions, Coco Ma, VP of scripted, and Tracy Liu, international acquisitions manager



China: Qian Xiao, program production, Leah Li, content acquisitions, and Yu Song, VP content development, all from Dragon TV; Sherry Tan, diector of the agency CAA, China; Ying Zhang, from CBS; and Qing Wang, acquisitions form SMG, China



Tencent China, buying and selling: Lexian Zhu, chief, documentary, and Frank Fu, senior strategic partner manager, Tencent (the last two in the picture) with Li Kang Documentary Laboratory, Stephanie Sun and Yuki Pon



Mediacorp CEO, Tham Loke Kheng with part of its programming and acquisition team plus networks from China, Japan and India, among others



Singtel Singapore: Lewis Heah, senior executive, content planning, YinQi Lee, manager, and Karen Lee, director, English Content



TV3 Malaysia: Jahaliah Hasan, manager, acquisition and content management, and Khairunnisa Kamarulzaman, manager, entertainment, brand management & programming group



Astro Malaysia: Henry Tom, COO; Khairul Anwar Salleh, VP Malay Customer Business; Agnes Rozario, VP Content Group



iQiyi China at CBS: Young Ming, Sharon Zeng, Luna Wang, and Jessie Wen, all from programming and acquisitions department



Lightbox, SVOD service from New Zealand: Dana Spangaro from Disney with Hema Patel, general manager, and Anna Tait, commercial director



Kazakhstan broadcasters: Bek Kenzhebai and Yerbol Begimbetov, JSC "Kazakhstan" TV & Radio Corporation, Sangerim Zhakhina, Television of Astana, Saltanat Auyesbayeva, JSC "Kazakhstan" TV & Radio Corporation, Alkhovskiy Denis, Channel 31, and Ilkham Ibragim, Astana TV



More channels from Kazakhstan: Vela Fidel, deputy general director, Fidel Liya and Ainur Akim, manager, both from Channel Seven, with Denis Alkhovskiy, programming director, Channel 31



South Africa: Tracey Gilchrist, director content acquisitions, Fox; Farzana Wadee, content specialist, series, and Candice Carlisle, acquisitions, both from ShowMax



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